eSTART

Course Guide for Managers

August 2015

General Information About This Manual

This manual is designed to provide State employees with an overview of the eSTART Time and Attendance System. This manual provides basic procedures; however, you may need to seek clarification on specific agency procedures or rules from your agency personnel manager or supervisor.

Nothing in this handbook should be construed to amend any laws, regulations, policies or procedures established by the State of Alabama or specifically the Alabama State Personnel Department.

Certain procedures contained within this manual are subject to change or revision without prior notice. Employees will be notified as soon as possible when changes or revisions occur.

All leave accruals and usages in eSTART are estimates and/or projections that are based on the concept that all employees earn leave and have leave to use. These estimates and projections may not be accurate.

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Getting Started

Importance and Benefits of eSTART

Purpose

It is important that your employees are compensated accurately. To make this happen, you need to manage employees' worked and non-worked hours, as well as attendance issues, in an efficient and timely manner. The application supports your ability to perform these tasks so that the data sent to payroll is accurate.

eSTART provides the following benefits to the State of Alabama:

- Provide system-wide accountability in time and labor management.
- Provide up-to-date accrual balances and projections.
- Assists with standardization and accuracy of payroll process.
- Provide employees access to their leave balances.
- Eliminate manual processes ensuring cost and paper reduction.

Roles and Responsibilities

Purpose

Each employee and manager has responsibilities that are important in the payroll process. Each person's role determines the responsibilities and tasks that he or she performs in the application.

Common Employee Tasks

On a daily basis or as-needed basis, employees perform the following tasks:

- Enter time data using a clock device or PC.
- Request time off.
- Review and approve timecard each pay period.
- Review schedules, punches, and leave accruals.
- View Inbox.
- Request extended leave cases.

Common Manager Tasks

On a daily basis, managers perform the following tasks:

- Check for timecard exceptions and make edits when applicable.
- Handle unexpected absences and missed time.
- Enter non-worked time for employees.
- Make schedule changes.

On a pay period or as-needed basis, managers perform the following tasks:

- Schedule employees for a specific time period.
- Monitor timecards and reports to facilitate payroll processing.
- Review and approve timecards.
- Request backup coverage.
- Manage time off requests.
- Initiate extended leave case for employee.
- Create personal HyperFind queries.

Common Agency Administrator Tasks

On a pay period or as-needed basis, typical Agency Administrator tasks include:

- Sign off timecards.
- Perform final audit of time records.
- Add specific pay codes to employee timecards.

Common Leave Administrator Tasks

On a pay period or as-needed basis, typical Leave Administrator tasks include:

- Determine eligibility and open leave cases.
- Administer leave cases.
- Run leave reports.

Common State Administrator Tasks

On a pay period or as-needed basis, typical State Administrator tasks include:

- Run reports.
- View/Update People records.

Logging On

Purpose

The eSTART log on page provides access to all the features of the eSTART application where you perform your time and attendance tasks.

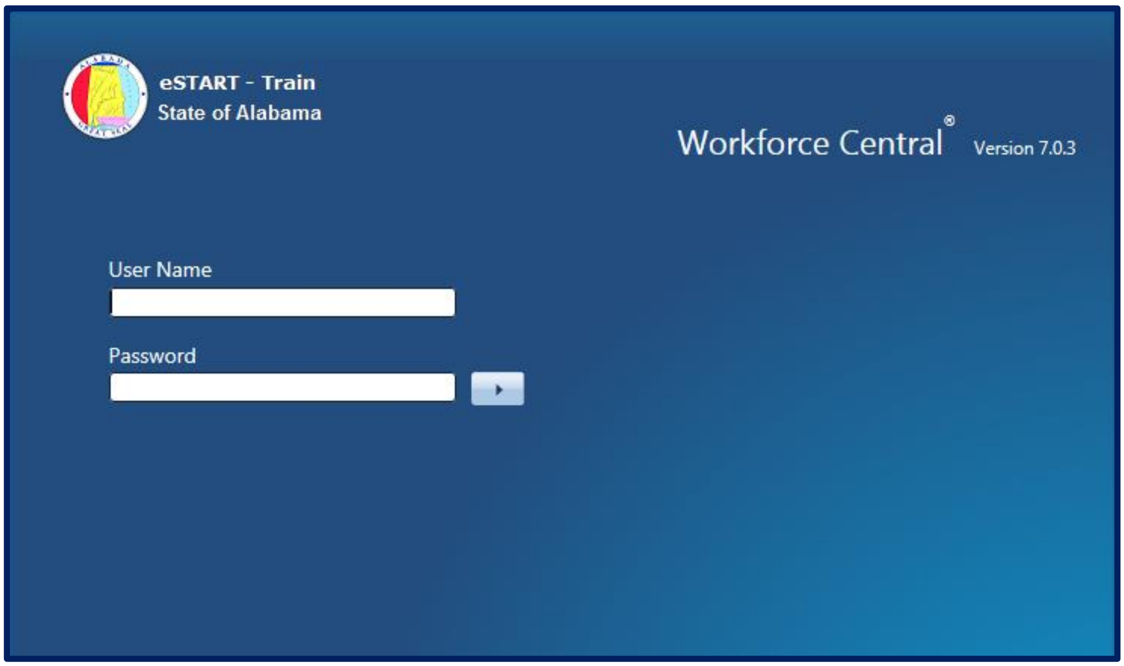
User Name and Password

If you use a computer and log on to the State's network, your User Name and Password will be the same as used to log into that network for the eSTART system. This is usually your full email address: **john.doe@finance.alabama.gov**.

If you do not have a network ID, your User Name will be provided by your Agency Administrator. The User Name will ordinarily be **firstname.lastname.** An initial password will also be provided that must be changed at first sign on.

Exercise

You, as a manager, log on to the eSTART application to review and work with your employees' timecards and scheduling data. It is a best practice to review this application each work day.



Steps	
1	Access the eSTART log on page.
2	Enter your user name and password in the designated fields.
3	Click the **Log On** button or press the **Enter** key on the keyboard.

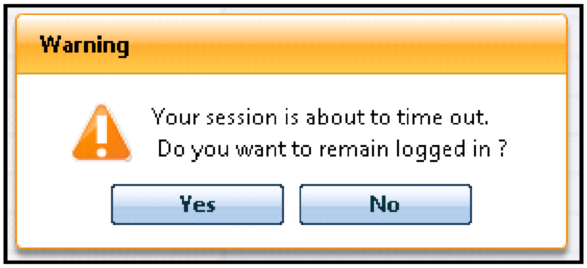
The Inactivity Timeout and Signing Out

Purpose

eSTART provides security to prevent other people from accessing your information. It also helps keep your employees' information confidential.

Regaining access after the inactivity timeout

The inactivity timeout protects sensitive information in the application. If the application does not detect activity within a specific amount of time, it attempts to automatically log you off. To regain access to the application, you must click Yes when asked to remain logged in. When you regain access, the application restores the last page you were viewing.



Best Business Practice

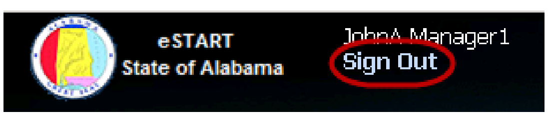
The inactivity timeout message displays if there is no activity for 30 minutes.

Caution

If you do not click Yes after receiving the inactivity timeout, you are logged out of the application. You will lose all unsaved edits.

Signing Out of eSTART

Upon completion of your tasks, you must sign out of eSTART to ensure that your employees' information remains confidential.



Caution

Clicking the Close (X) button without first signing out can leave your connection to the application open, which might allow unauthorized people to view and edit your information.

Tip

eSTART is a browser-based application. However, you should not use the browser's navigation controls—the Back button on the toolbar, for example. Only use the links inside of eSTART to do your work.

Navigating eSTART

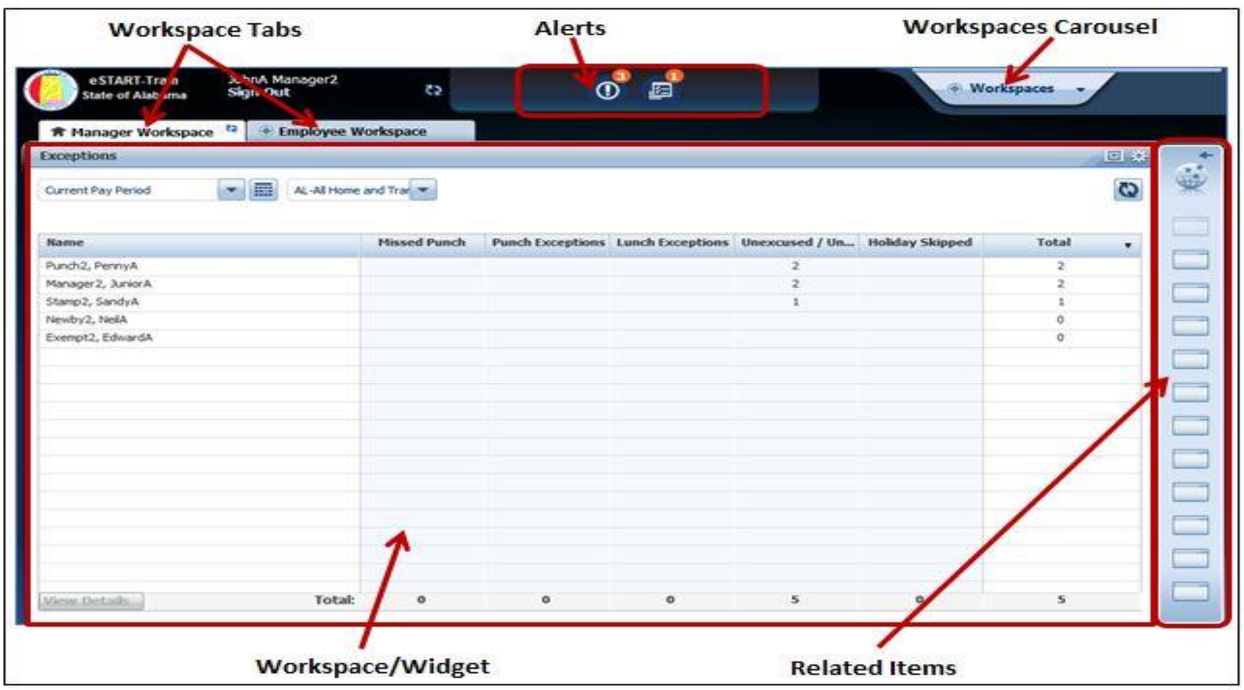
Introducing the Navigator

Purpose

After you log on to eSTART, your Navigator pane displays. The Navigator is a customized view of the time and labor information that is important to completing your daily work tasks. It is designed to be simple with easy-to-use views. You should take a few minutes to get acquainted with its navigation features.

Navigator Components

The Navigator consists of four main components: Alerts, Workspaces, Workspaces carousel, and Related Items pane.



Navigator Component	Description
Alerts	Your Navigator contains two alerts, Exceptions and Requests, which have been configured to notify you when specific events or conditions occur. Because the alerts always display in your Navigator, you will know immediately if something requires your attention.
Workspace	Your Navigator contains two other workspaces. A workspace is a layout designed to accommodate a specific business need. The manager workspace is the default or "home" workspace.
Widgets	Widgets are self-contained components that are used to access specific eSTART information or tasks.
Workspaces carousel	Since the manager's Navigator is configured to include more than one workspace, all workspaces other than the home workspace are listed in the Workspaces carousel. You can display additional workspaces in your Navigator by selecting them in the Workspaces carousel.
Related Items	Widgets that are available, but not displayed in the selected workspace are accessed via the Related Items pane. They can be clicked and dragged into an open workspace, or clicked to open the widget in a temporary workspace.

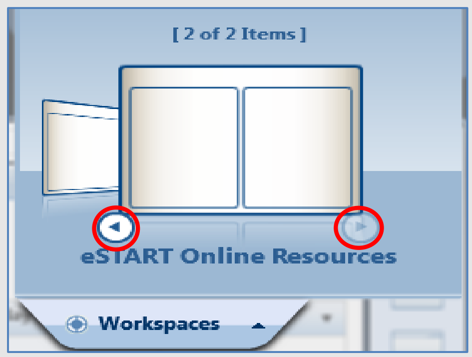
Viewing Workspaces

Purpose

Your Navigator is configured to provide more than one workspace. The default workspace for Managers is the Manager workspace, but you can select other workspaces to display. Additional workspaces include:

- **Employee Workspace** – displays your individual timecard, calendar and leave functions.
- **eSTART Online Resources** - displays eSTART resources including job aids, training videos, etc.

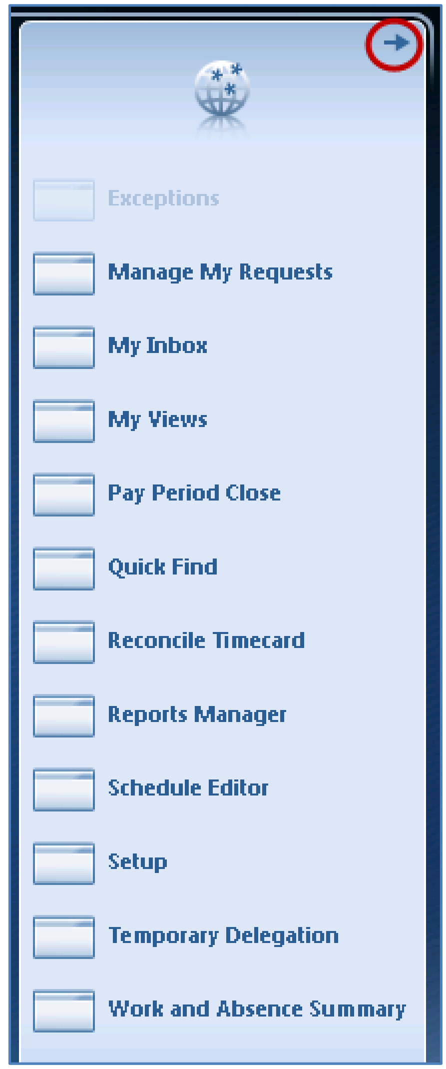
Example

Steps		
1	To open the Workspaces carousel, click the **Workspaces** tab.	
2	Click the arrows to rotate through the available workspaces.	
3	Click on the **eSTART Online Resources** workspace to open. **NOTE:** To close the Workspaces carousel without selecting a workspace, click the **Workspaces** tab again.	
4	The selected workspace opens and a new tab for the workspace is added. The Workspaces carousel closes.	
5	After selecting workspaces from the workspace carousel, you can switch to a different workspace by selecting the associated tab. Note that your home workspace will be indicated by a 🏠 in the tab. The refresh button is used to refresh the page.	
6	To close a workspace and return it to the carousel, click the **X** on the tab. The refresh icon can be used to refresh the page.	

The Related Items pane

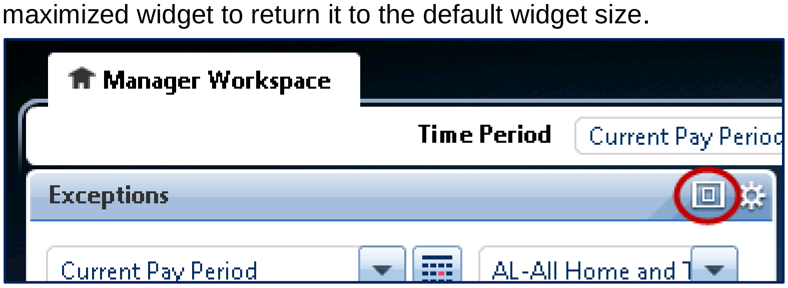
Widgets that are available but not displayed in the selected workspace are accessed via the Related Items pane. They can be clicked or dragged into an open workspace, or clicked to open the widget in a temporary workspace.

- Click the arrow in the upper-right corner to open and close the Related Items pane.
- Use the scroll buttons at the top or bottom of the pane to view additional widgets within the pane.



Managing Open Widgets

There may be occasions when you will see more than one widget open in the workspace, for example when you drag a widget to the workspace. To maximize a specific widget to fill the workspace, click the **Maximize** button in the upper right-hand corner of the widget. You can click the same button in a maximized widget to return it to the default widget size.



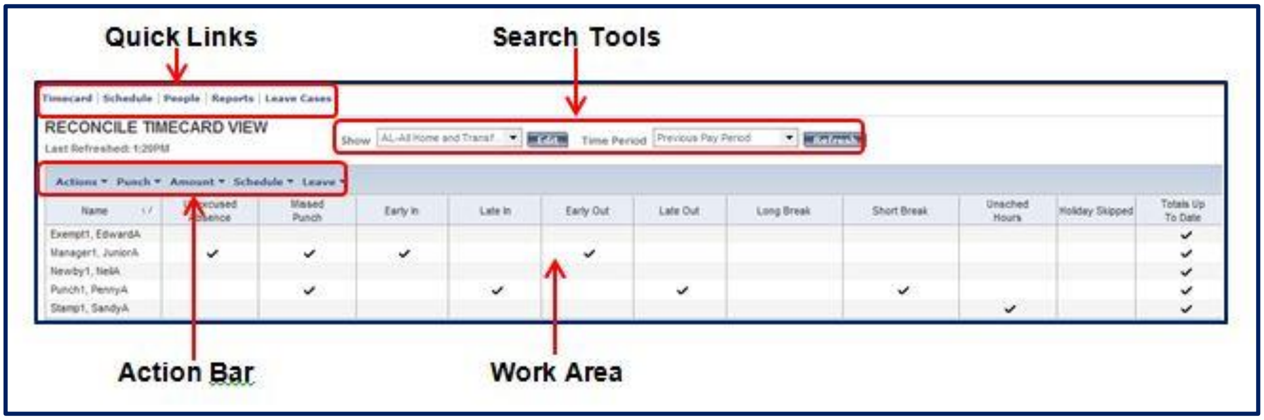
Navigating Widgets in eSTART

Purpose

eSTART pages allow you to perform less common or more complex tasks. You can use widgets in eSTART to display these pages and complete these tasks.

The key areas of eSTART Pages

eSTART pages contain four main areas: Quick Links, search tools, the action bar, and the work area.



Areas	Description
Quick Links	Allows you to quickly access the Timecard, Schedule, People record, Reports or Leave Cases related to any employees you select from the Name column.
Search tools	Include: • The **Show** drop-down where you can select a specific set of employees • The **Time Period** drop-down where you select the timeframe for which you want to view schedules and timecard data
Action bar	Allows you to perform tasks to selected employees, such as editing punches, approving timecards, and other common tasks.
Work area	The work area contains detailed information about the employees in the selected time period, as well as the action bar, which contains selections for modifying data.

Managing Exceptions for Non-Exempt Employees

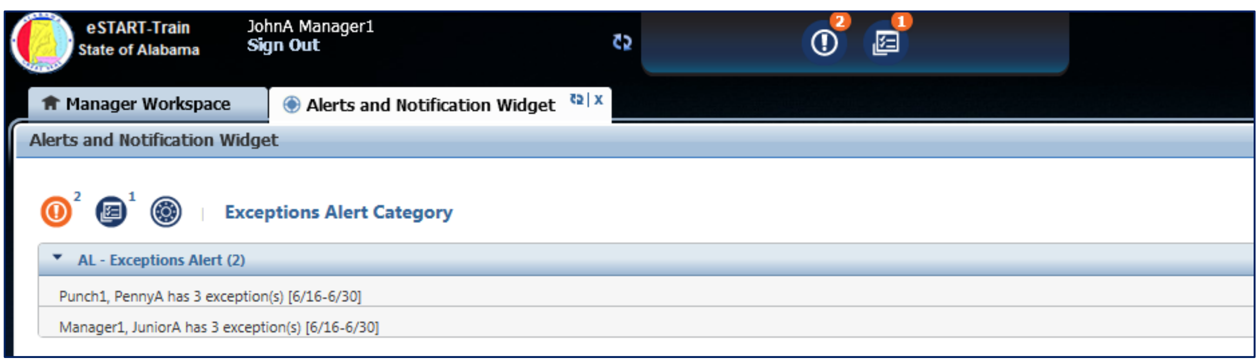
Using the Exceptions Alert

Purpose

Your Navigator is configured to receive exceptions alerts. If one of your employees has triggered a time exception that requires your attention, you will see an Alerts icon at the top of your Navigator when you log in.

Click the **Alert** icon to see a list of the exceptions. Select an employee from the list to view the details of the exception. The Exceptions widget displays. The **X** may be used to close the alert.

The **View All** button opens the Alerts and Notification Widget. This widget is used to view a history of alerts.



Once opened, the alert category can be changed from **Exceptions Alert** to **Request Manager Alert** by selecting the round icons on the widget. Once selected, the icon changes to an orange color. The third icon is for “uncategorized” alerts and is not used. Use the **X** to close the tab.

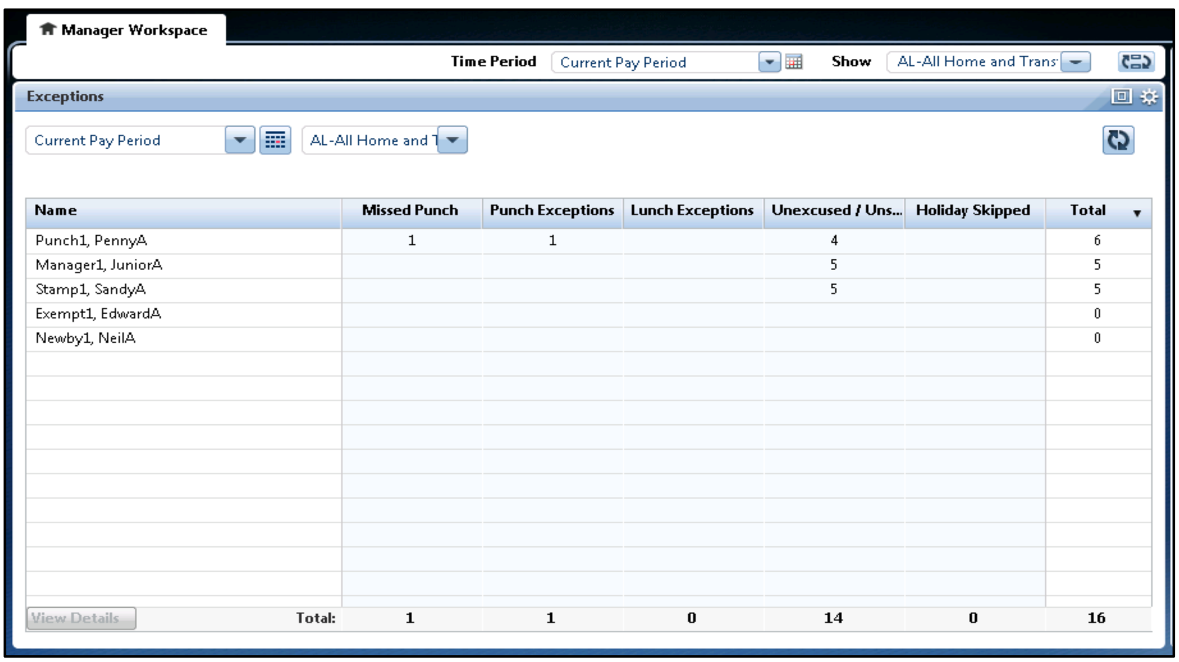
Viewing the Exceptions Widget

Purpose

When non-exempt employees forget to punch, or punch in early or late, their pay may be impacted. Therefore, it is your responsibility to resolve any discrepancies to ensure that employees are paid correctly. In addition, unresolved missing punches can delay payroll processing. The Exceptions widget allows you to recognize and resolve the most common types of exceptions.

The Summary View

In the Summary View, the Exceptions widget displays a list of your employees for the time period and HyperFind selected at the top of the widget. It organizes the employee exceptions by type. The exception types displayed include missed punches, punch exceptions (such as late or early), lunch exceptions (short or long), unexcused or unscheduled hours, and holiday skipped.



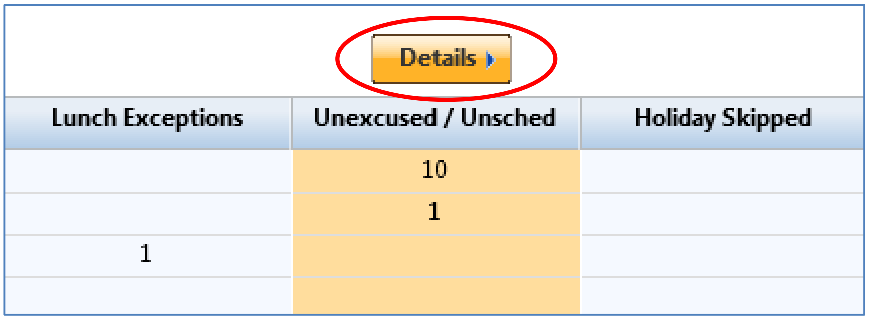
Exception Type	Description
Missed Punch	Employee did not punch in or out at their scheduled time.
Punch Exceptions	Employee punched in or out early or late, based on their schedule.
Lunch Exceptions	Employee took a long or short lunch break.
Unexcused/Unscheduled	Unexcused - Employee is scheduled to work but did not punch in at all. Unscheduled - Employee punched in but is not scheduled to work.
Holiday Skipped	Non-exempt employee who did not work the scheduled day before and scheduled day after a holiday.

NOTE

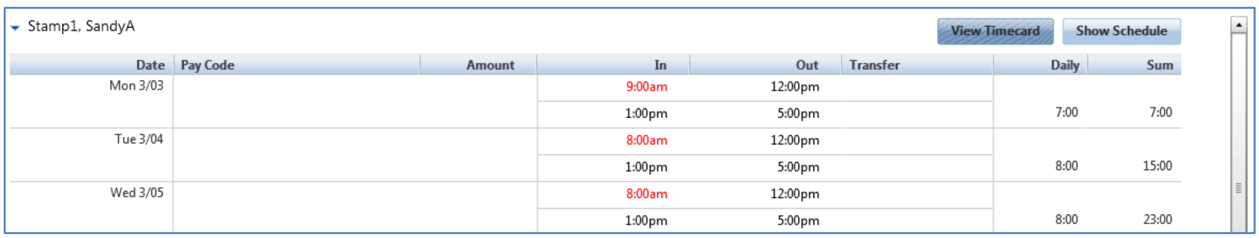
The Exceptions widget is one of two places in eSTART where employee exceptions can be edited. Editing exceptions in an employee's timecard will be covered in a later module.

Details View by Exception Type

To access the Details view by exception type, hover your cursor over the exception type column heading and then click the **Details** button.



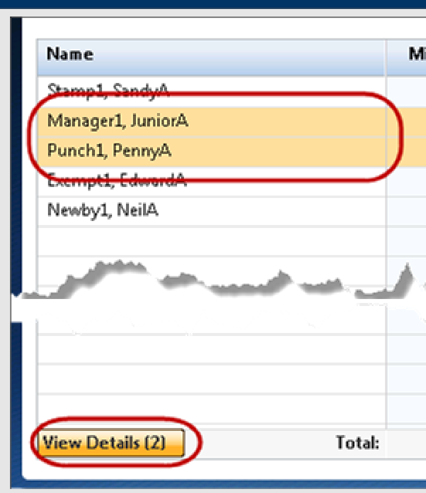
This view shows all employees that have the same type of exception. Note that only dates with exceptions displays on the summary page.



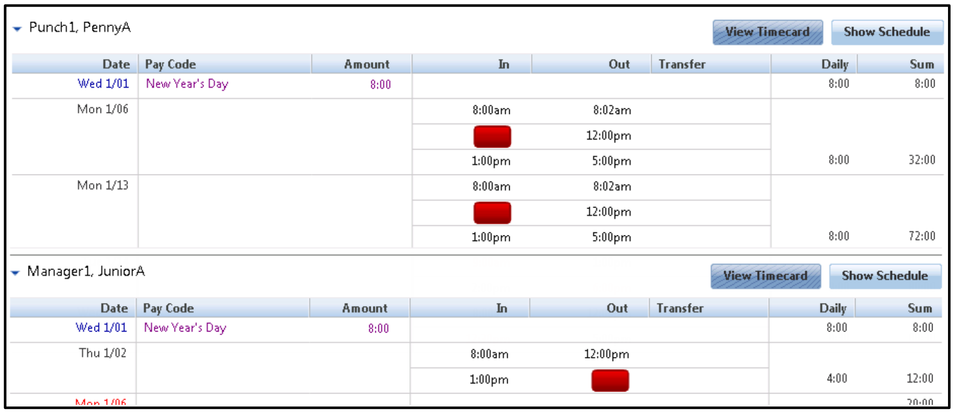
The Details View

Details for exceptions can be viewed by employee or by exception type. In either case, the Details view is where exceptions are resolved for non-exempt employees.

Details View for an Employee(s)

Steps		
1	Select **Previous Pay Period**.	
2	Select **Junior Manager** and **Penny Punch**. **Tip**: Hold down the **CTRL** key to select multiple employee names.	
3	Click the **View Details** button.	

This view shows all exceptions for the employee(s) selected. Note that only dates with exceptions display on the summary page.



Recognizing common exceptions and visual cues in the Time Detail View

The Exceptions widget provides visual indicators to help managers quickly understand time issues that require their immediate attention. The following table summarizes the most common visual cues.

Description	Visual Indicator
In or Out punch cell is solid red	Missed or Double punch
In or Out time displays in red text	Early in or out/Late in or out
Date displays in red text	Unexcused absence
In or Out punches are in green text	Punch has been marked as reviewed
In or Out punches are in purple	Punch has been populated by the eSTART system
Date displays in blue text	Excused absence

Action Buttons in the Details View

The following table lists and describes the action buttons you will see in the Exceptions widget. These buttons allow you to resolve exceptions in non-exempt timecards.

Action Button	Description
Save	Saves changes to the database. Button becomes orange when changes have been made but not saved.
Cancel	Cancel changes that you have made prior to saving. Button becomes orange when changes have been made but not saved.
View Timecard	Allows you to view the non-exempt timecard view.
Show Schedule	Allows you to view the employee's schedule.
Mark as Reviewed	Allows you to identify exceptions that have already been addressed. The color of the exception changes to green and the Mark as Reviewed button changes to Unmark as Reviewed.
Change to Scheduled	This feature is not utilized at this time.
Comment	Opens the Add Punch Comment dialog box. Select a comment.
Add Punch	Opens the Add Punch dialog box and allows you to insert punches.
Remove	Allows you to remove punches.
Justify	This feature is not utilized at this time.

Marking/Unmarking Exceptions as Reviewed

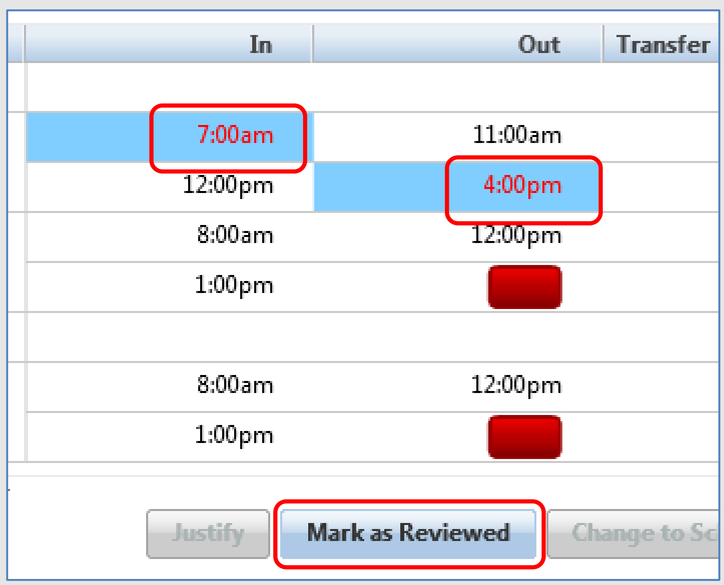
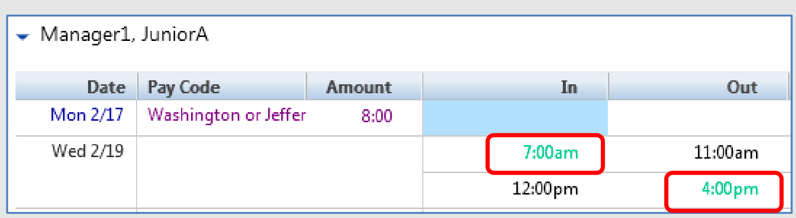
Purpose

Once you have reviewed an exception and resolved it, you can mark the exception as reviewed. The exception will remain visible in the Exceptions widget and timecard, but the text color will be changed to green. At any time, you can choose to unmark an exception as reviewed.

NOTE: Marking an exception reviewed is optional.

Exercise

On Wednesday of the **previous pay period**, **Junior Manager** arrived early to work because he needed to leave early. Mark the exception as reviewed so it does not have to be checked again.

Steps		
1	In the time detail view, select the cell(s) containing the exception for **Junior Manager** and **Penny Punch**. **NOTE:** You may hold the **Ctrl** key and click your mouse to select more than one cell.	
2	To mark an exception as reviewed, click **Mark as Reviewed**. **NOTE:** To unmark an exception as reviewed, click **Unmark as Reviewed**.	
3	Review the results. **NOTE:** Click **View Timecard** to access the full timecard for an employee.	
4	Click the **Save** button.	

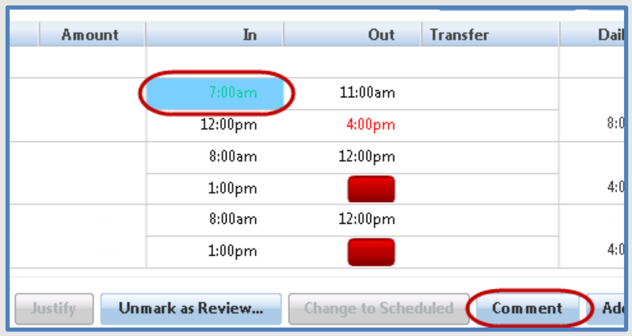
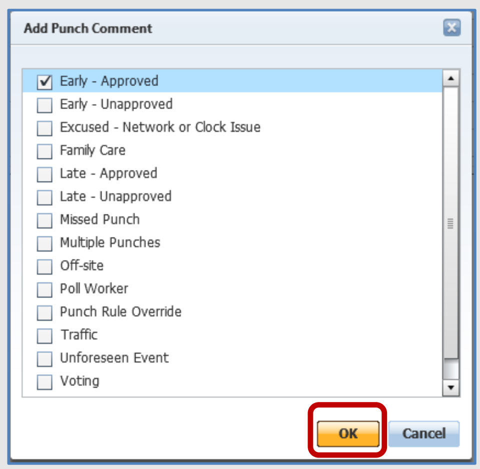
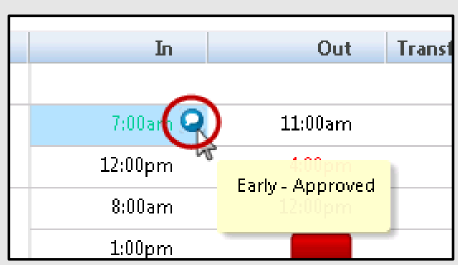
Attaching Comments to Punches

Purpose

Comments are predefined descriptive phrases you attach to a punch to provide additional, useful information about that transaction. You may attach as many comments as needed to explain the punch.

Exercise

On Wednesday of the **previous pay period**, **Junior Manager** arrived early to work because he needed to leave early. You have marked the exception reviewed. Now add a comment that the early arrival was excused. Attach an **Early-Approved** comment to the employee's **7:00 a.m**. punch.

Steps		
1	In the time detail view, select the cell containing the exception.	
2	Click **Comment**.	
3	From the list of comments, select **Early-Approved.** **NOTE:** More than one comment can be selected, if needed.	
4	Click **OK**.	
5	Click the **Save** button.	
6	Confirm that the **note** icon displays in the time detail view. Hover the cursor over the icon to view the comment. **NOTE:** Click **View Timecard** to access the full timecard for an employee.	

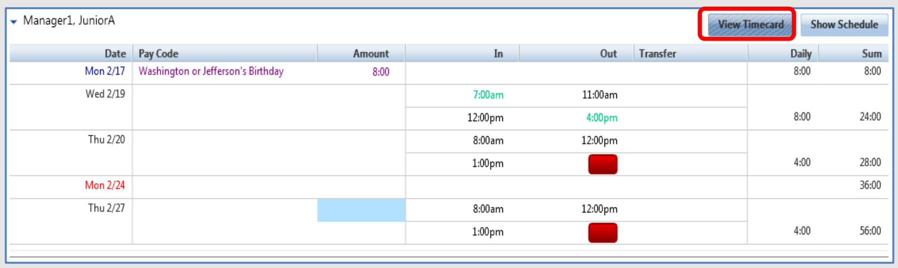
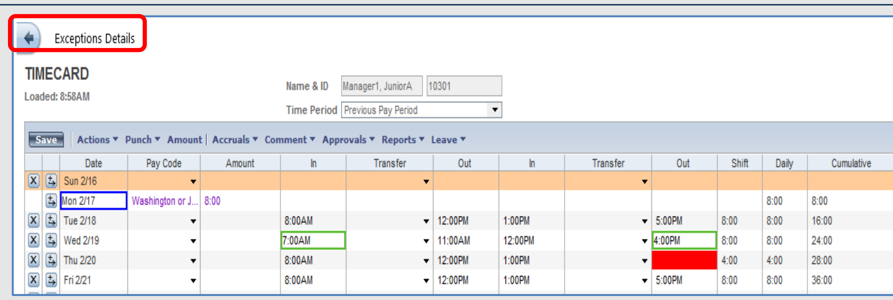
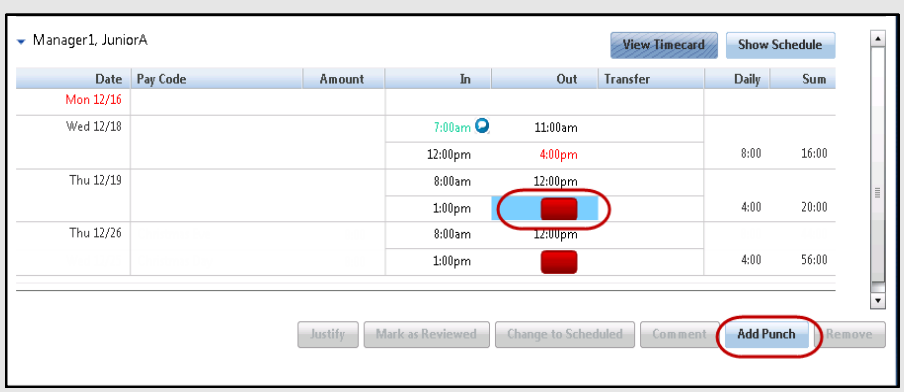
Adding Missed Punches

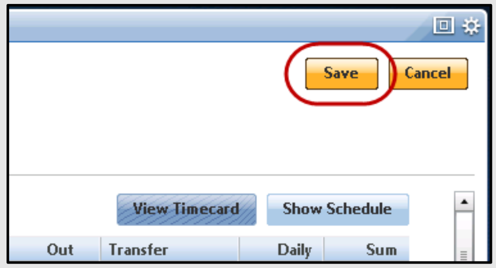
Purpose

An employee might forget to punch in or out. When this happens, a solid-red box displays in the missed In or Out cell. To add that punch, the Add Punch feature may be used to enter the missed time or the time may be keyed directly into the cell. The application accepts multiple formats for entering punches in a timecard.

Exercise

Junior Manager notified you that he forgot to punch out on the first Thursday of the **previous pay period**. The employee ended his shift at 5:00 p.m. From the Exceptions Detail view, enter a **5:00 p.m. out punch.**

Steps		
1	Select the **View Timecard** button from the Exception Detail screen.	
2	Notice how the exception displays on the timecard. Select the **Exceptions Detail** back arrow icon to return to the Exception Detail screen.	
3	In the time detail view, select the cell containing the Missing Punch exception.	
4	Double-click and enter **5p** directly in the cell or select the **Add Punch** button to correct the time.	

Steps		
5	Click **Save**. Confirm that the exception no longer displays in the exception detail view. If there are no other exceptions for a given day, the day will no longer display in the exceptions detail view when you save.	
6	Select the **View Timecard** button to review the change to the timecard.	

Best Business Practice

You **must** clear all items in the Missed Punch column of the Exceptions Summary view. Administrators will not have the ability to sign off on payroll until all missed punches are corrected.

Tip

You may return to the Exceptions Summary view from the Details view by clicking the back arrow icon in the Details view.

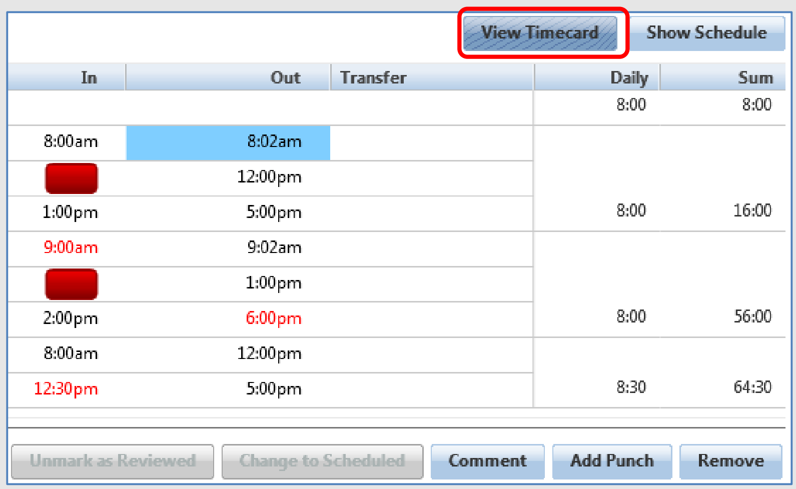
Removing Punches

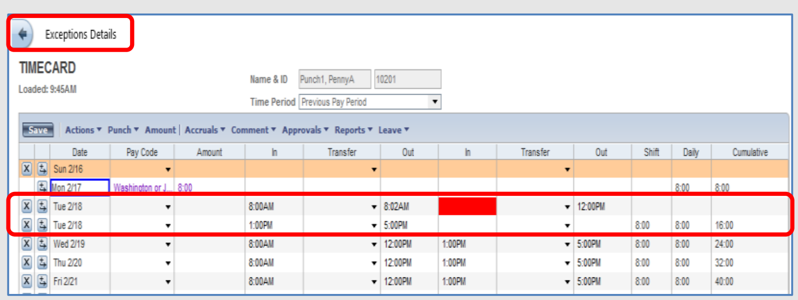
Purpose

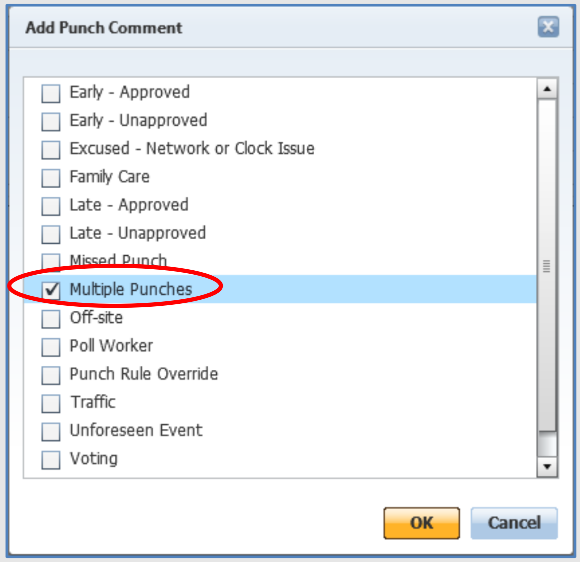
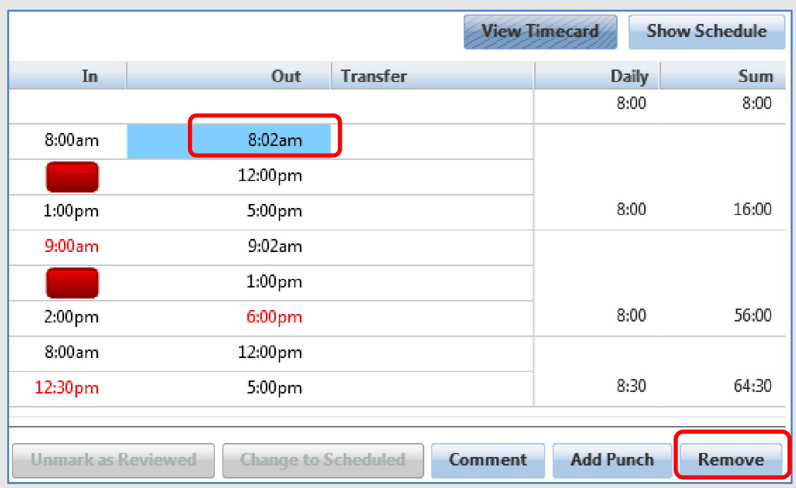
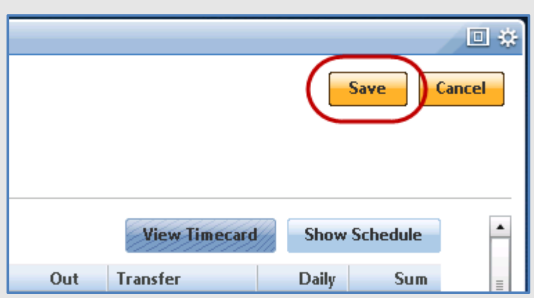
As a rule, you should not remove punches from timecards because they represent actual times that employees started and stopped working. However, there are some exceptions to this rule. For example, an employee might inadvertently punch twice when starting or ending a shift. When this occurs, you will want to remove the extra punch.

Exercise

Penny Punch could not remember if she punched in at the beginning of her shift on Monday of the **previous pay period**. She punched in a second time to ensure that she recorded her start of shift time. While reviewing the employee's exceptions details, you notice that two In punches display for the employee's start of shift on Monday. You want to **remove the employee's second In punch at 8:02 a.m.**

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>Select the View Timecard button from the Exception Details screen.</td><td>
</td></tr>
<tr><td>2</td><td>Notice how the exception displays on the timecard. The double punch added a new line to the timecard.

Select the Exceptions Details back arrow icon to return to the Exception Detail screen.</td><td>
</td></tr>
</table>

Steps		
3	Select the **8:02** punch. Click the **Comment** button and select **Multiple Punches**. Click **OK.** **SAVE THE PAGE BEFORE REMOVING THE PUNCH.**	
4	Select the **8:02** punch again.	
5	Click **Remove**.	
6	Click **Save**. Confirm that the exception no longer displays in the exceptions detail view. If there are no other exceptions for a given day, the day will no longer display in the exceptions details view when you save.	
7	Select the **View Timecard** button to review the change to the timecard.	

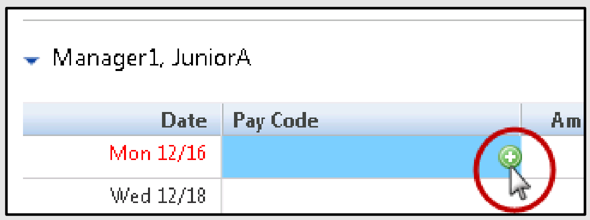
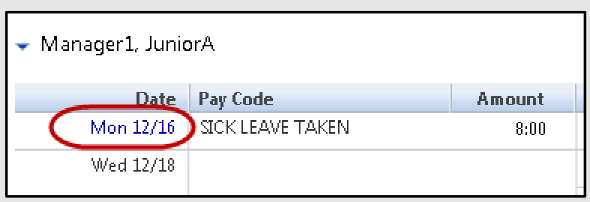
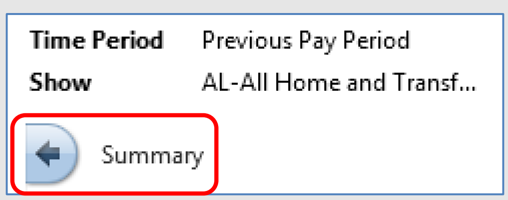
Using Pay Codes to Track Non-Worked Time

Purpose

Pay codes keep track of the type of worked and non-worked time that is entered. It is important that hours are tracked to the correct pay code so that employees are paid correctly. There are times when you might have to edit an employee's time data and use a pay code to track his or her non-worked time.

Exercise

Junior Manager was sick on **Monday of the previous pay period**. His timecard was not updated and eSTART flags the date as an unexcused absence. Edit the employee's timecard for the **Previous Pay Period** to reflect the sick leave.

Steps		
1	Access the employee's exception Details view.	
2	Hover the cursor over the **Pay Code** cell.	
3	Click the green plus sign.	
4	Select the applicable pay code in the **Pay Code** drop-down list.	
5	In the **Amount** field, enter the number of hours.	
6	Click **OK**.	
7	Click **Save**. **NOTE:** The date color will change from red to blue to indicate that the absence is now excused.	
8	Select the **Summary** back arrow icon to return to the Exception Summary screen.	
9	Click the **Refresh** icon to update the Exception Summary screen. Notice the exceptions numbers are reduced.	

Acceptable formats for entering pay code hours

Acceptable Format	Example	Interpretation by eSTART
Leading zeroes (optional)	07	7:00 hours
Colon	7:30	7:30 hours **NOTE:** If you enter hours without a colon or a leading zero, eSTART interprets your entry as is, which may be a much larger number of hours than you intended. For example, if you enter 730 (without the colon or leading zero), eSTART interprets that as 730 hours.
Decimal	8.5	8:30 hours

Editing Time and Attendance Data in the Timecard

Accessing and Viewing Employees' Timecards

Purpose

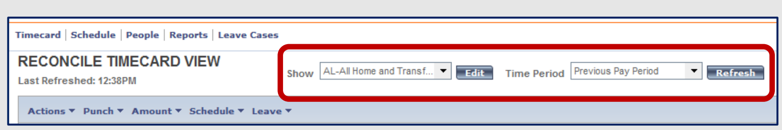
The Exceptions widget is not the only way to view employees' time data. Use **Related Items>Reconcile Timecard** to quickly access and review employees' time and attendance data. From **Reconcile Timecard**, you can open employees' timecards and make any needed adjustments prior to payroll processing. Changes to employee time above and beyond what is managed in the Exceptions widget are managed in the non-exempt timecard view.

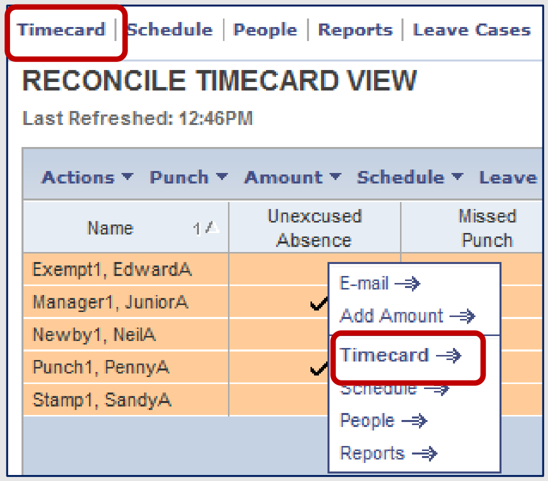
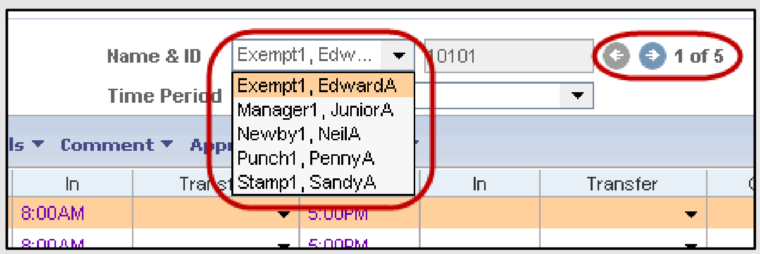
The **Reconcile Timecard** page shows a different view of existing exceptions. Each exception displays in a separate column and if the exception is present in the timecard, a check mark displays. A description of each exception is below.

Exception Type	Description
Unexcused Absence	Employee is scheduled to work but did not punch in at all.
Missed Punch	The employee did not punch in or out either for lunch or at the end of the day. In other words, their punch is missing.
Early In	Employee punched in early.
Late In	Employee punched in late.
Early Out	Employee punched out early.
Late Out	Employee punched out late.
Long Break	Employee took a long lunch break.
Short Break	Employee took a short lunch break.
Unscheduled	Employee punched in but is not scheduled to work.
Holiday Skipped	Non-exempt employee who did not work the scheduled day before and scheduled day after a holiday.

Exercise

In reviewing Reconcile Timecard, you notice that several employees have time and attendance exceptions. Open each employee's timecard to review and adjust the data.

Steps		
1	From the **Related Items** pane, select **Reconcile Timecard**.	
2	In the **Show** drop-down list, the list defaults to **All Home and Transferred-In**. From the **Time Period** drop-down list, select **Previous Pay Period**.	

Steps		
3	Select **all employees**.	
4	Click the **Timecard** quick link. OR Right-click and select **Timecard**.	
5	If you selected more than one employee, do one of the following: • Click the **Next** scroll button to move to the next employee. You can use the **Previous** scroll button to move to a previous employee. • Select an employee from the **Name & ID** drop-down list.	

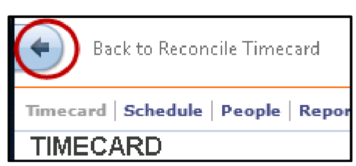
Tip

There are various ways to select employees in an eSTART widget:

- Hold the **Ctrl** key and click your mouse to select more than one employee not listed next to the other.
- To select a group of employees listed together, use one of these methods:
  - Click the first employee, then hold the **Shift** key and click your mouse to select the last employee. This will select all employees in-between.
  - Click and drag the mouse to select multiple employees.
  - Choose **Actions>Select All** to select all employees.

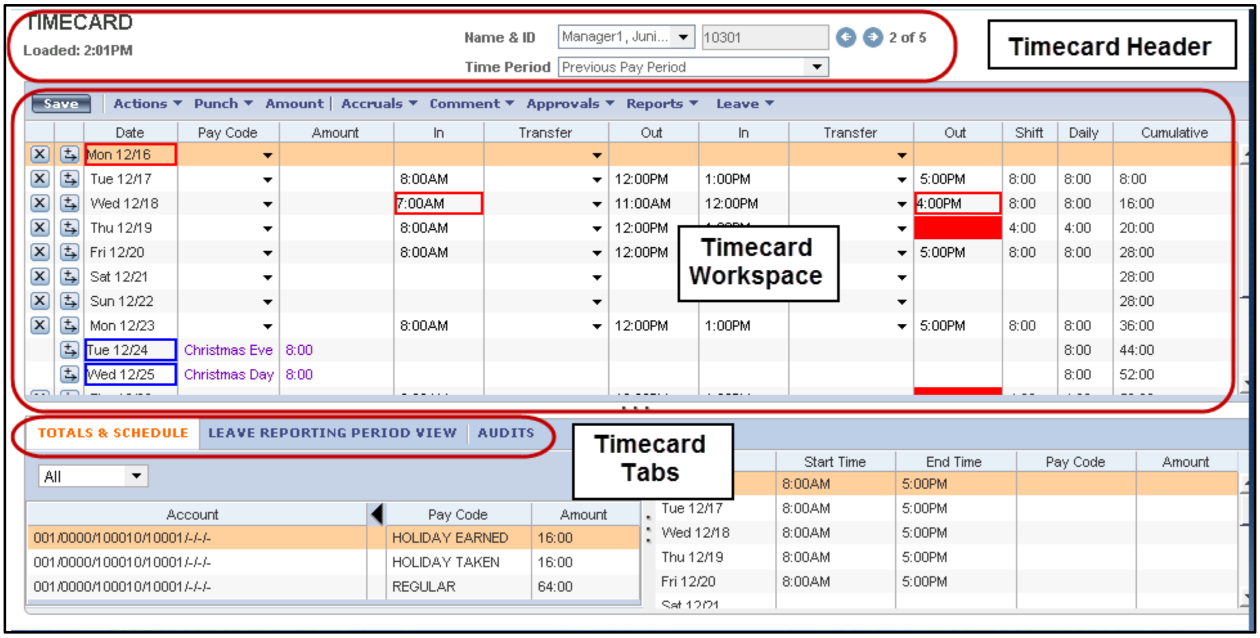
Tip

To return to the Reconcile Timecard widget from an open timecard, click the **Back to Reconcile Timecard** arrow icon.



Non-Exempt Timecard Overview

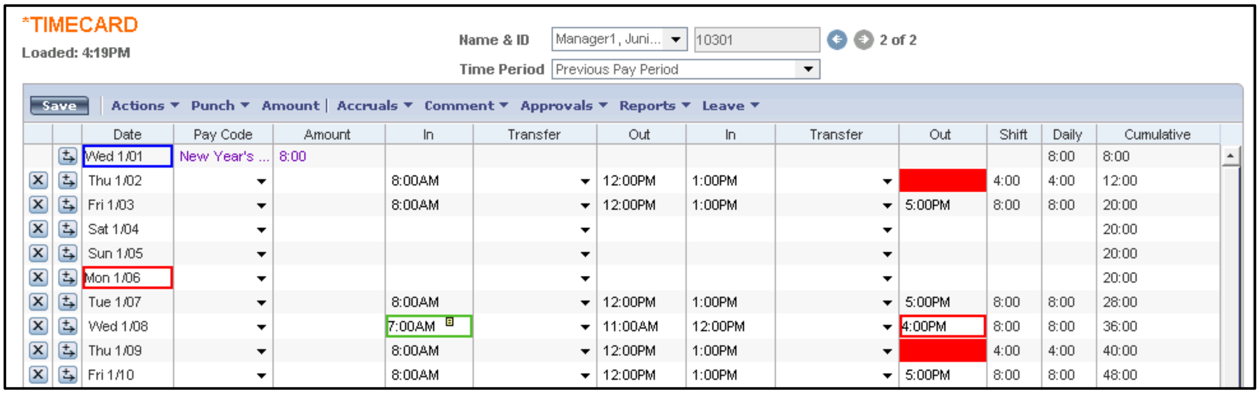
There are three main areas on a timecard: Timecard Header; Timecard Workspace; and Timecard Tabs.



Timecard Area	Description
Timecard Header	Displays the following information: • Employee's name whose information displays in the timecard workspace and timecard tabs. • Employee's identification number. • Time period.
Timecard Workspace	Displays the following information: • Menu bar that contains selections for performing timekeeping tasks. • Grid containing dates for the selected time period. • Time entry totals, including shift, daily, and cumulative hours. **Shift Total** — Calculated total hours of all shifts worked on the selected day (excluding totals for non-shift items such as pay codes). **Daily Total** — Calculated total hours of the selected day, including pay codes. **Cumulative** — Cumulative total up to and including the selected day.
Timecard Tabs	Display additional information about how eSTART tracks employee hours. Three default tabs display: • **Totals & Schedule** — The area on the left displays the timecard totals. The area on the right displays the Schedule for each day of the selected time period. • **Leave Reporting Period View** — Displays accrual codes and available leave balances based on the date selected. • **Audits** — Lists all edits made to an employee's timecard. **NOTE:** Additional tabs display based on actions you perform.

Visual Indicators

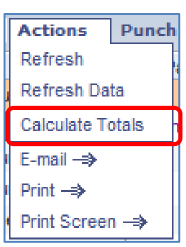
Visual indicators display on a timecard when an exception occurs. For example, an employee might forget to clock in or out, which causes a missed punch exception. An employee might clock in early or late, which causes a punch exception.



Visual Indicator	Description
Blue-bordered date	An excused absence for the day, such as Annual Leave, Sick Leave, or Jury Duty
Red-bordered date	An unexcused absence for the day
Red-bordered punch	An exception, such as a late or early punch, or a short or long break
Green-bordered punch	Exception has been marked as reviewed
Solid-**red** cell	A missed punch
Purple	A transaction that was added by the eSTART application
Yellow note icon within cell	One or more comments are attached to the punch

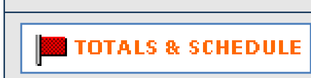
Calculating Totals

To see the effects of a change on the employee's time before saving, use the **Calculate Totals** feature on the Actions drop-down menu.



Refreshing and Saving Data in Timecards

When you add and modify timecard data, eSTART displays your edits but does not save them automatically. You must tell the application to save the data.

Visual Indicator	Description
Timecard title in **ORANGE** with asterisk	Unsaved edits
	Red Flag indicates totals are not up-to-date

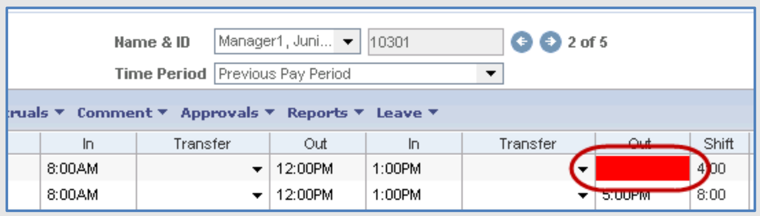
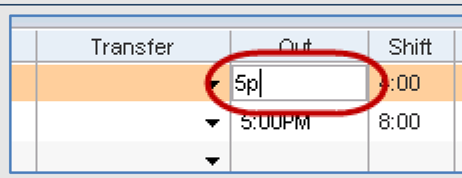
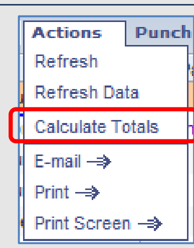
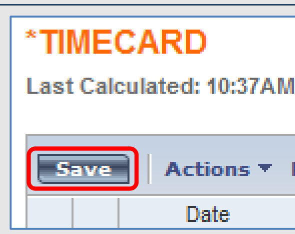
Adding Missed Punches

Purpose

An employee might forget to punch in or out. When this happens, a solid-red box displays in the missed In or Out cell. To add that punch, you click the cell and type the missed time. The application accepts multiple formats for entering punches in a timecard.

Exercise

Junior Manager notified you that he forgot to punch out on the **second Thursday of the previous pay period**. The employee ended his shift at 5:00 p.m. Access the employee's timecard and add a **5:00 p.m. out punch** on the employee's timecard for the second Thursday of the previous pay period.

Steps		
1	Access the employee's timecard.	
2	Select **Previous Pay Period** from the **Time Period** drop-down list.	
3	Click the **Out** punch cell containing the missed punch exception.	
4	Enter **5p** or **5pm** in the cell. **NOTE:** Always use the p or pm when keying time into a cell.	
5	Select **Actions>Calculate Totals**. Ensure the changes you made are correct. Notice the Daily and Cumulative hours have now updated based on your changes.	
6	Once you have determined the timecard/hours are correct select the **Save** button.	

Best Business Practice

You must correct all Missed Punch exceptions on the timecards. Administrators will not have the ability to sign-off on the payroll until all missed punches are corrected.

Adding Pay Code Hours to Timecards

Purpose

Pay codes keep track of the type of worked and non-worked time that is entered in the timecard. Examples of pay codes include: Annual Leave, Sick Leave and Personal Leave Day.

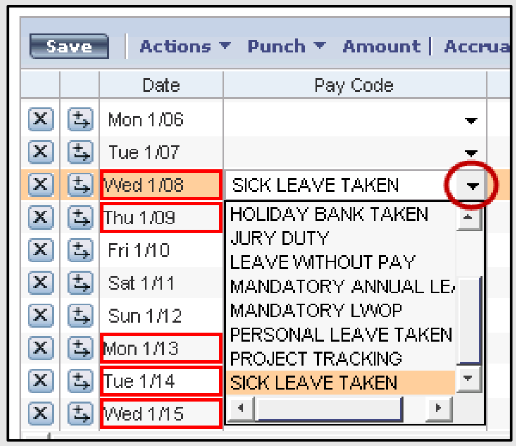
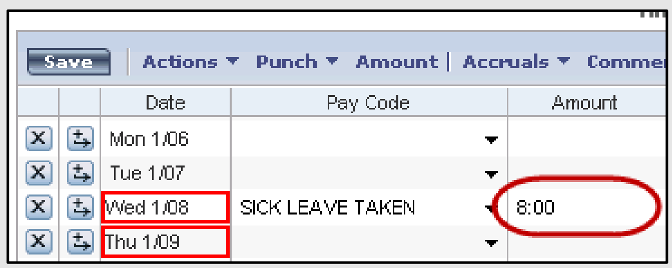
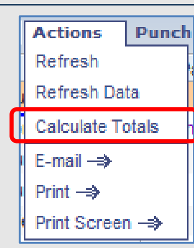
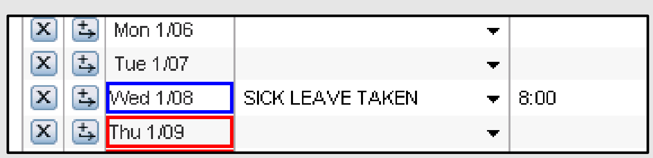
It is important that hours are tracked to the correct pay code so that the employee is paid correctly. There are times when you might have to edit an employee's timecard and use a pay code to track his or her worked or non-worked time, for example, when the employee calls in sick.

Acceptable formats for entering pay code hours

Acceptable Format	Example	Interpretation by eSTART
Leading zeroes (optional)	07	7:00 hours
Colon	7:30	7:30 hours **NOTE:** If you enter hours without a colon or a leading zero, eSTART interprets your entry as is, which may be a much larger number of hours than you intended. For example, if you enter 730 (without the colon or leading zero), eSTART interprets that as 730 hours.
Decimal	8.5	8:30 hours

Exercise

Junior Manager was sick one day this week. His timecard was not updated to reflect this and eSTART flags him with an unexcused absence. Edit the employee’s timecard for the **Current Pay Period** to reflect the sick leave.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>In the timecard, select the Sick Leave Taken pay code from the Pay Code drop-down list.</td><td>
</td></tr>
<tr><td>2</td><td>Click the Amount cell next to the pay code you selected. Enter the number of hours, using an acceptable format.</td><td>
</td></tr>
<tr><td>3</td><td>Select Actions>Calculate Totals.
Ensure the changes you made are correct. Notice the Daily and Cumulative hours have now updated based on your changes.</td><td>
</td></tr>
<tr><td>4</td><td>Once you have determined the timecard/hours are correct select the Save button.
NOTE: If the pay code edit excuses an absence, the red colored border around the date will change to blue.</td><td>
</td></tr>
</table>

NOTE

You cannot add a pay code to a row that contains punches; you must insert a separate row for the pay code transaction.

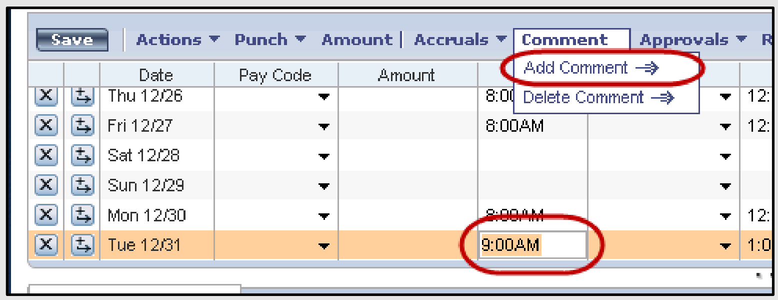
Attaching Comments to Punches

Purpose

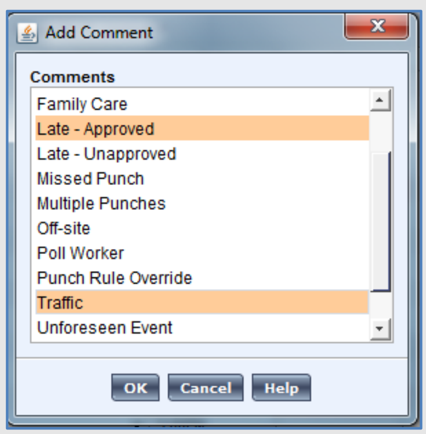
Comments are predefined descriptive phrases you may attach to a punch to provide additional, useful information about that transaction. You may attach as many comments as needed to explain the punch.

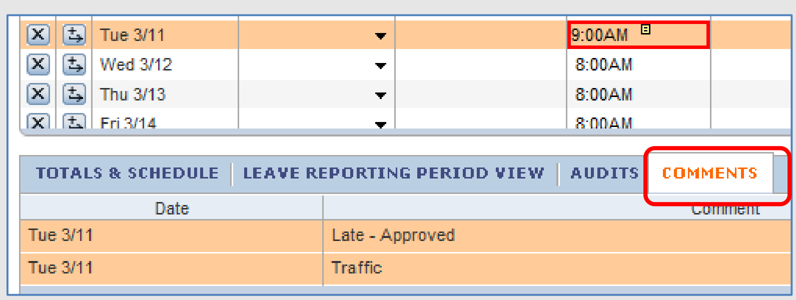
Exercise

On the second Tuesday of the **previous pay period**, **Penny Punch** arrived late to work because of traffic. You want to add a comment to her 9:00 a.m. punch as a reminder of why she arrived late. Access her timecard and add the **Traffic** comment to the **9:00 a.m. punch** for Tuesday.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>In the timecard, click the cell that contains the punch to which you want to add a comment.</td><td rowspan="2">
</td></tr>
<tr><td>2</td><td>Select Comment >Add Comment.

NOTE: You can also right-click the cell and select Add Comment from the shortcut menu.</td></tr>
<tr><td>3</td><td>Select Late-Approved and Traffic.

Tip: More than one comment may be selected. Hold the Ctrl key to select more than one comment.</td><td rowspan="3">
</td></tr>
<tr><td>4</td><td>Click OK.</td></tr>
<tr><td>5</td><td>Click Save.</td></tr>
<tr><td>6</td><td>To view comments, click the Comments tab at the bottom of the timecard.

NOTE: A comment may be deleted from the Comments tab. Highlight the comment, right-click on it and select Delete Comment.</td><td>
</td></tr>
</table>

Marking/Unmarking Exceptions as Reviewed

Purpose

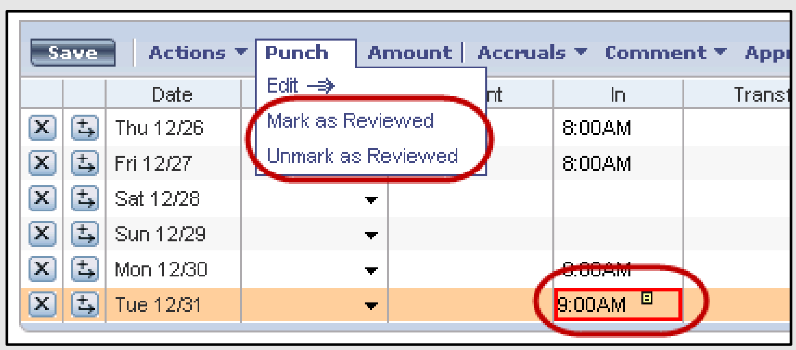
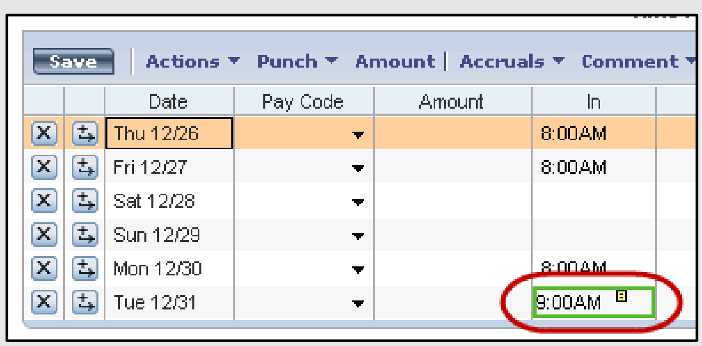
Once you review an exception and resolve it you can mark the exception as reviewed. The exception remains visible in the timecard and in customized views, but no longer displays in exception reports or queries. Once the exception is marked as reviewed, a green border displays around the cell containing the exception.

You can unmark an exception as reviewed at any time.

NOTE: Marking an exception reviewed is optional.

Exercise

On Tuesday, **Penny Punch** arrived late to work because of traffic. You added a comment to her 9:00 a.m. punch as a reminder of the reason for the late punch. Now you want to mark the exception as reviewed so that you do not re-check it again at a later date. She also asked permission to work an extra hour in order to make up the time, which you approved. So we can also mark the late out exception reviewed.

Steps		
1	In the timecard, select the cell containing the exception.	
2	Select the **9 am punch**. Then select **Punch>Mark as Reviewed**. Then select the **6 pm punch** and repeat the process. **NOTE:** You can also right-click the cell and select these options from the shortcut menu.	
3	Review the results.	
4	**Save** the changes.	

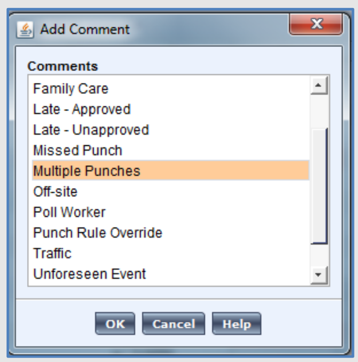
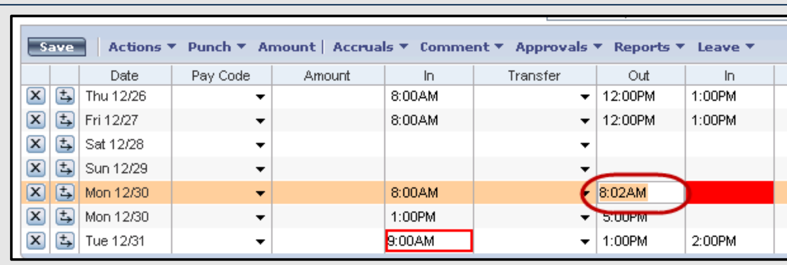
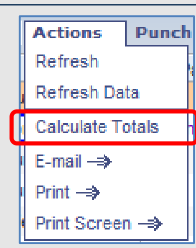
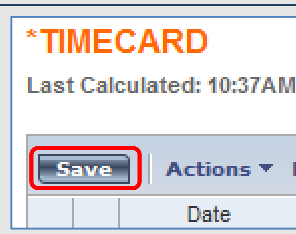
Deleting Punches

Purpose

As a rule, you should not delete punches from timecards because they represent actual times that employees started and stopped working. However, there are some exceptions to this rule. For example, an employee might punch twice when starting or ending a shift. When this occurs, you should delete the extra punch. The **Audits** tab provides a record of all timecard edits, including any deleted punches.

Exercise

Penny Punch could not remember if she punched in at the beginning of her shift on the **second Monday of the previous pay period**. She punched in a second time to ensure that she recorded her start-of-shift time. While reviewing the employee's timecard, you notice that two in punches display for the employee's start of shift on Monday. You want to **delete the employee's second in punch of 8:02 a.m.**

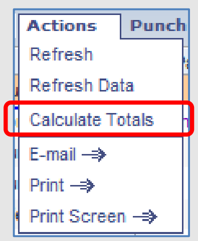
Steps		
1	First, select the **8:02am** punch and add a comment for audit purposes.	
2	Right click and select **Add Comment**. Select the comment **Multiple Punches**. Click **OK**. **<u>SAVE THE PAGE BEFORE DELETING THE PUNCH</u>**.	
3	Once the comment has been saved, click the **8:02am** cell.	
4	Press the **Delete** key on the keyboard.	
5	Select **Actions>Calculate Totals**. Ensure the changes you made are correct. Notice the Daily and Cumulative hours have now updated based on your changes.	
6	Once you have determined the timecard/hours are correct, select the **Save** button.	

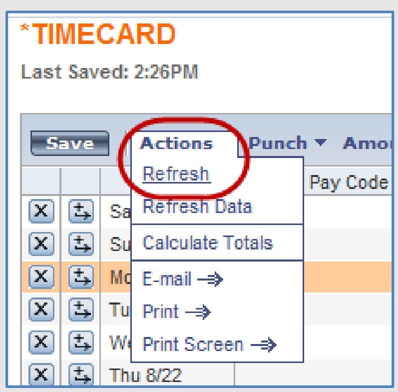
Cancelling Edits

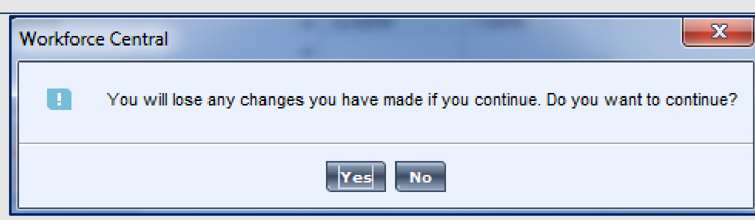
Exercise

If you make a change to a timecard and decide not to keep it, you can cancel the edit by using **Actions>Refresh**.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>In Penny’s timecard, change one of her out punches from 5 o’clock to 3 o’clock.</td><td>
</td></tr>
<tr><td>2</td><td>Select Actions>Calculate Totals.

Notice the Daily and Cumulative hours have now updated based on your changes.</td><td>
</td></tr>
<tr><td>3</td><td>Did you remember to key 3p or pm? If not, Penny’s timecard may look like this.

So you decide you don’t want to keep the change.</td><td>
</td></tr>
<tr><td>4</td><td>Select Actions>Refresh.</td><td>
</td></tr>
<tr><td>5</td><td>A message displays stating you will lose any changes you have made if you continue. Do you want to continue?

Click Yes to cancel your changes.</td><td>
</td></tr>
</table>

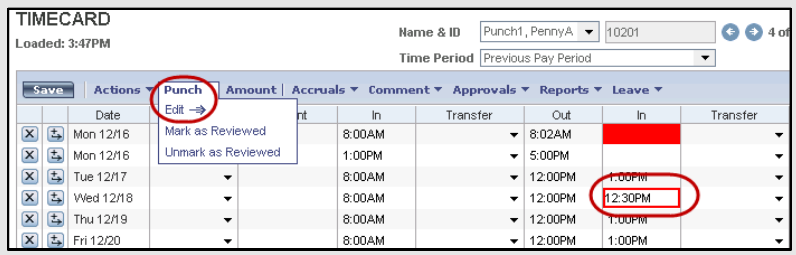
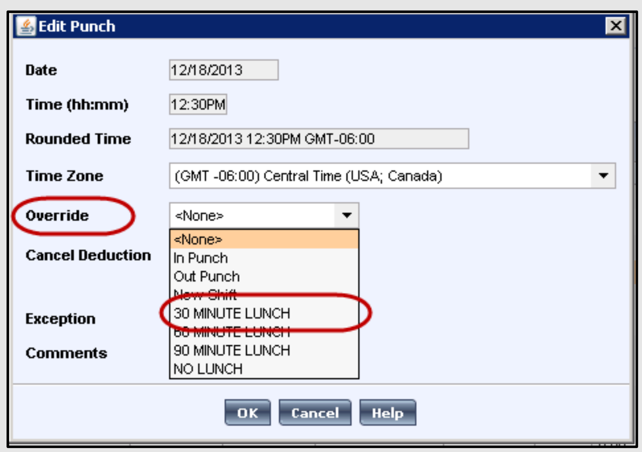
Overriding Punches

Purpose

When employees punch in or out for their shifts, a punch can be misinterpreted by the system if a punch is missed during the day. An in punch may be interpreted as an out punch or vice versa. It is also possible that an exception related to a lunch break will also be applied if an employee takes a lunch break shorter than their assigned lunch rule. If a punch is incorrectly labeled or a lunch exception is incorrectly applied, you can override the punch to correct the error.

Exercise

You needed **Penny Punch** to return from lunch 30 minutes early on **Wednesday of the previous pay period**, but she normally receives a 60 minute lunch. The system recorded her return punch from lunch as a Short Break exception. To get rid of the exception for this circumstance, you may choose to override the exception.

Steps		
1	In the timecard, select the punch you want to override. Select **Punch>Edit**.	
2	Select **30 Minute Lunch** from the **Override** drop-down list.	
3	Click **OK**.	
4	Click **Save**.	

NOTE

Any overtime or compensatory time resulting from this type of exception should be managed according to Agency policy.

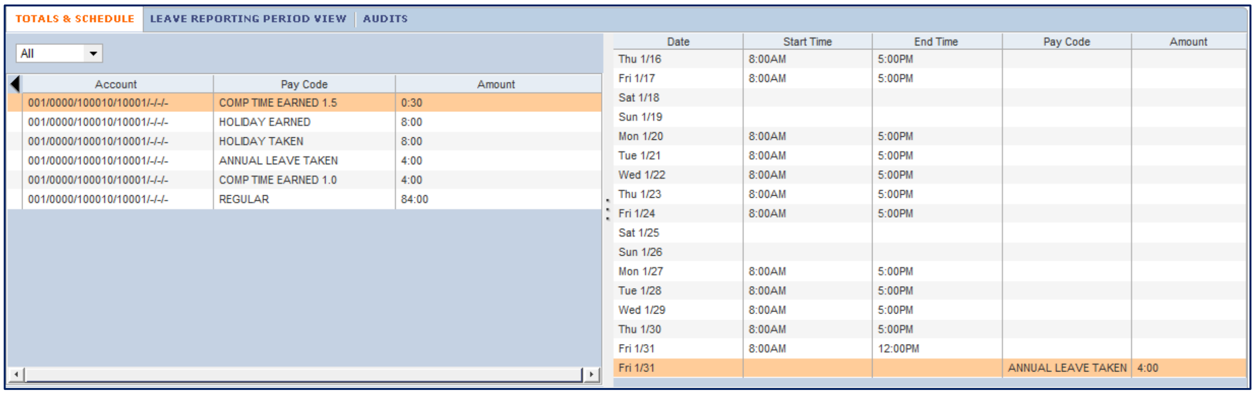
Totals and Schedule Tab

Purpose

The Totals and Schedule tab displays the employee's worked and non-worked time for the pay period in the left pane of the screen below. The drop-down box defaults to **All**, but can be changed to **Shift**, **Daily** or **Cumulative** to view totals as needed.

The right pane shows the employee's schedule for the pay period. Any approved leave time will display here as well.

The following illustration shows the **Totals and Schedule** Tab.



Description of the columns in the **Totals** section:

Column	Description
Account	The labor level to which the employee is assigned. Further information can be found on this in the employee's People Editor. (Agency/Division/Work Location/Manager ID/Job Classification Code)
Pay Code	The pay code to which the worked or non-worked time is assigned. Any overtime or comp time will display here as well.
Amount	The number of hours earned or taken in each pay code.

Description of the columns in the **Schedule** section:

Column	Description
Date	The date of the pay period to which the schedule is assigned.
Start Time	The employee's scheduled start time.
End Time	The employee's scheduled end time.
Pay Code	The pay code which replaces all or a portion of the employee's schedule. Examples of this are Annual Leave, Sick Leave, Personal Day, etc.
Amount	The amount of time associated with the above pay code.

Viewing Accrual Balances in Timecards

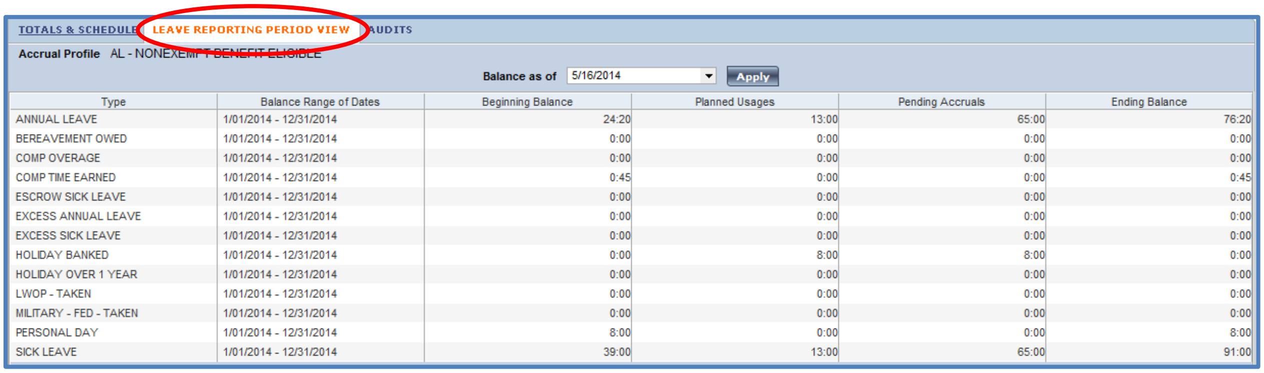
Purpose

The Leave Reporting Period View tab displays the employee's accrued time for each accrual code in the employee's assigned accrual profile. You can quickly see up-to-date accrual balances, such as Annual Leave and Sick Leave.

The following illustration shows the **Leave Reporting Period View** tab.

Example

Review the leave balance for Penny Punch.



Type	Balance Range of Dates	Beginning Balance	Planned Usages	Pending Accruals	Ending Balance
ANNUAL LEAVE	1/01/2014 - 12/31/2014	24:20	13:00	65:00	76:20
BEREAVEMENT OWED	1/01/2014 - 12/31/2014	0:00	0:00	0:00	0:00
COMP OVERAGE	1/01/2014 - 12/31/2014	0:00	0:00	0:00	0:00
COMP TIME EARNED	1/01/2014 - 12/31/2014	0:45	0:00	0:00	0:45
ESCROW SICK LEAVE	1/01/2014 - 12/31/2014	0:00	0:00	0:00	0:00
EXCESS ANNUAL LEAVE	1/01/2014 - 12/31/2014	0:00	0:00	0:00	0:00
EXCESS SICK LEAVE	1/01/2014 - 12/31/2014	0:00	0:00	0:00	0:00
HOLIDAY BANKED	1/01/2014 - 12/31/2014	0:00	8:00	8:00	0:00
HOLIDAY OVER 1 YEAR	1/01/2014 - 12/31/2014	0:00	0:00	0:00	0:00
LWOP - TAKEN	1/01/2014 - 12/31/2014	0:00	0:00	0:00	0:00
MILITARY - FED - TAKEN	1/01/2014 - 12/31/2014	0:00	0:00	0:00	0:00
PERSONAL DAY	1/01/2014 - 12/31/2014	8:00	0:00	0:00	8:00
SICK LEAVE	1/01/2014 - 12/31/2014	39:00	13:00	65:00	91:00

Column	Description
Type	The type of accrual balance, such as Annual Leave or Sick Leave
Balance Range of Dates	The leave reporting period (current year)
Beginning Balance	The accrual balance from the payroll system as of the date in the **Balance as of** drop-down
Planned Usages	The total amount of time scheduled to be taken, from the **Balance as of** date through the end of the Reporting Period (12/31)
Pending Accruals	The total accruals projected from the **Balance as of** date through the end of the Reporting Period (12/31). The projections assume the employee will work the appropriate number of hours to earn the accruals.
Ending Balance	The accrual balance as of December 31st, including Pending Accruals and Planned Usages

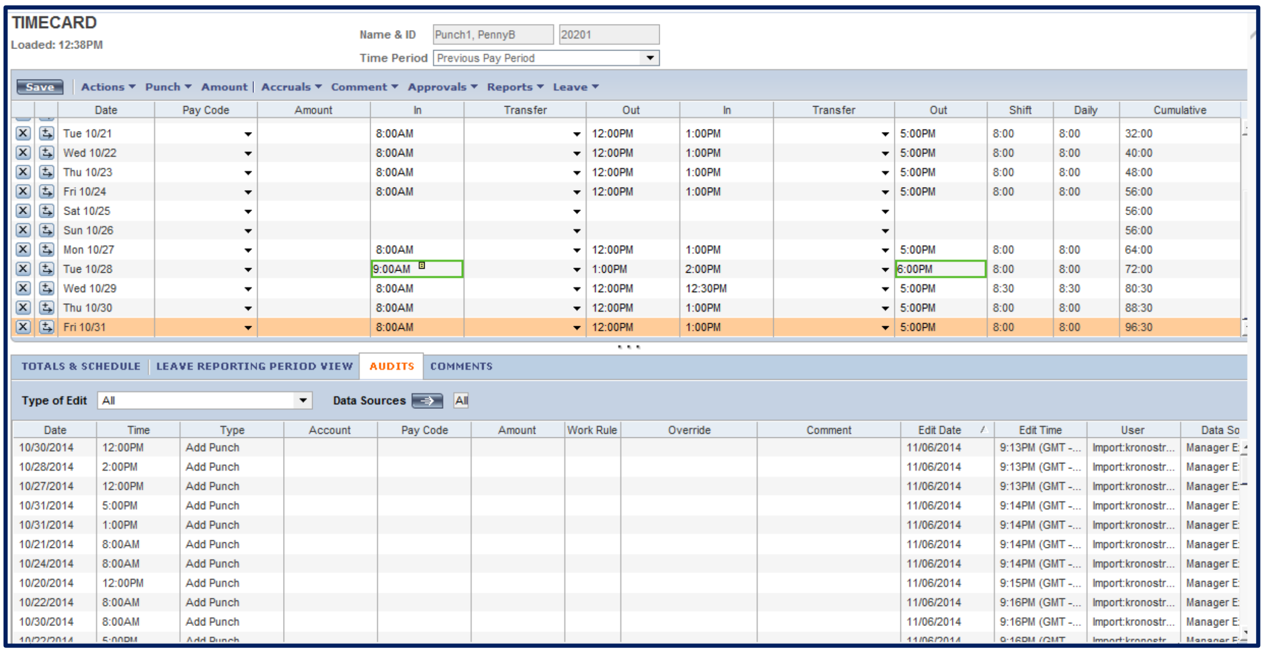
Viewing the Audit Trail

Purpose

The **Audits** tab is located at the bottom of the Timecard workspace. **All timecard changes are logged here for audit purposes, including timecard approval**. The tab also lists punches made from timestamping. You can view all data sources or a specific data source, such as edits to a timecard. Within a timecard, you can view all edits or a specific type of edit, such as punch edits.

Example

Select the timecard of **Penny Punch** in the **Previous Pay Period**.

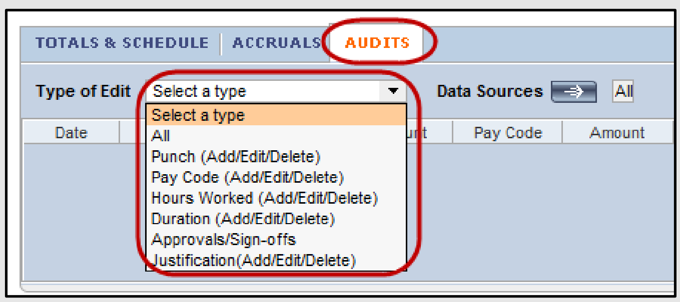
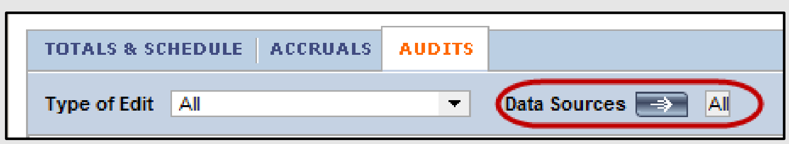
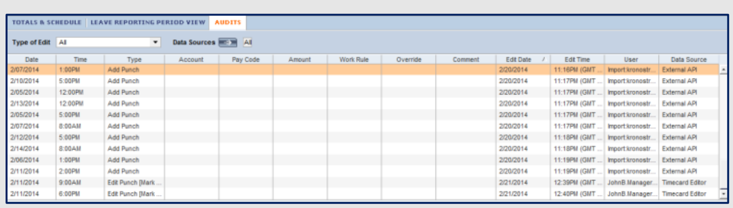


Column	Description
Date/Time	The effective date and time of the edit
Type	The type of edit that was performed
Account	The account to which the edit is attributed, if different from the primary account
Pay Code/Amount	The pay code and number of hours assigned, if applicable
Work Rule	The work rule used with the edit, if different from the employee’s primary work rule
Override	The type of entry that this edit is replacing or canceling, if applicable
Comment	The comment attached to the edit
Edit Date/Time	The date and time the edit was made
User	The user name of the person who edited the transaction
Data Source	The component of the application where the edit was made

Types of Edits	Description
All	Displays all timecard edits made in the employee’s timecard for the selected Time Period
Punch (Add/Edit/Delete)	Displays only timecard edits made to the **In** or **Out** punch columns in the employee’s timecard for the selected Time Period, including the attachment of comments
Pay Code (Add/Edit/Delete)	Displays only timecard edits made to **Pay Code** and **Amount** columns in the employee’s timecard for the selected Time Period, including the attachment of comments
Hours Worked (Add/Edit/Delete)	Displays only timecard edits made using the **Hours Worked** pay code in the employee’s timecard for the selected Time Period, including the attachment of comments
Duration (Add/Edit/Delete)	*This feature is not utilized at this time.*
Approvals/Sign-offs	Displays all employee and manager approvals as well as time period approved, sign-off date and time
Justification (Add/Edit/Delete)	*This feature is not utilized at this time.*

Exercise

You want to review all manual edits that have been made to **Penny Punch’s** timecard.

Steps		
1	From a timecard, click the **Audits** tab.	
2	Select a type of edit or select **All** to display all types of edits from **Type of Edit** drop-down list.	
3	(Optional) Click the **Data Sources** arrow. ***It is recommended that “All Data Sources” remain selected.***	
4	View the results.	
5	Scroll down to the bottom of the list to see the changes you made to Penny’s timecard today.	

Scheduling Employees

Introducing Scheduling

Using the application's scheduling capabilities, you can quickly compare the differences between worked and scheduled time and identify additional workload needs. You can also track employees' absences as well as early or late arrivals. To take full advantage of these capabilities, you need to create, review, and maintain accurate schedules for employees in the application.

Schedules are used for two key reasons: to match staffing to workload requirements and to manage time and labor data for individual employees.

When you manage time and labor data for individual employees with schedules, you can:

- Track attendance.
- Specify how to enforce restrictions and round punches.
- Track exceptions such as when an employee is early, late, or absent.
- Associate work rules with the right schedules.
- Schedule and view non-worked hours, such as annual leave in advance.
- Pre-populate employee timecards with standard schedule information.

Scheduling process

The scheduling process helps you identify whether your employees' schedules meet the workload requirements. The following illustration shows the five main stages in the scheduling process:

Assess workload

Each division has unique staffing needs, which is driven by its workload requirements for a given period. Often managers assess the amount of work that needs to be performed in their division and then evaluate how to meet those demands with their workforce. You typically know your workload before you work with eSTART scheduling.

Update group assignments

New hires can be assigned to a **schedule group** to provide exception reporting. You can change these initial assignments as your staffing needs change.

Meet workload requirements

After you identify your workload needs for a specific time period, you can assign schedules to employees in your division to meet those needs. Assigning schedules to employees allows you to compare employee work hours to scheduled hours to identify discrepancies and take any necessary action.

Evaluate the schedules

After you finish scheduling your employees for a given period, you need to evaluate the final schedule to ensure that it meets your workload needs for that time period. You can evaluate each employee's total scheduled hours to ensure that the employee meets the requirements. You can also view scheduled hour totals to ensure alignment with your budget and keep overtime to a minimum.

Maintain the schedules

There may be times when you need to change schedules so that the information in eSTART is accurate and your workforce is paid correctly.

Scheduling terms

The following table describes key scheduling terms used in eSTART:

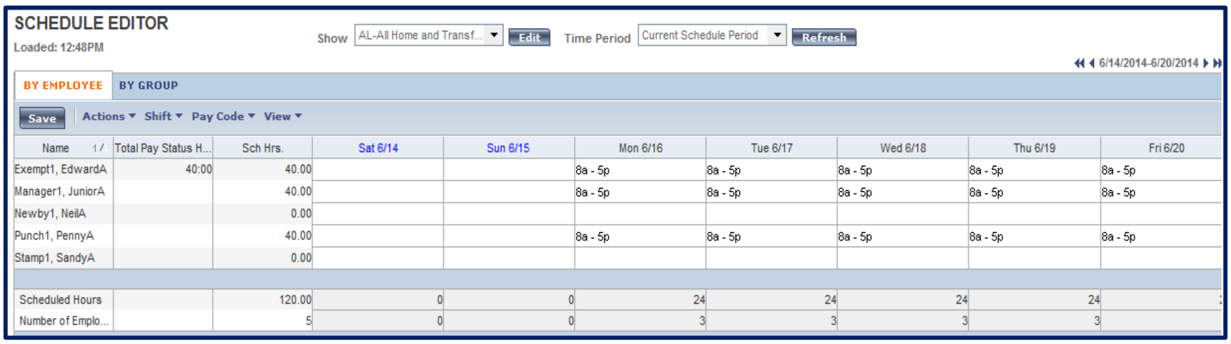
Term	Description
Schedule	The plan for worked and non-worked days for an employee in the past, present, and the future.
Schedule Groups	A way to organize employees for easier and quicker scheduling. Usually employees work the same schedule, but you may also group employees to make it easier to select and sort.
Shift	The time an employee is expected to work. A shift contains a start time and an end time.
Totals	Rows that display the sum of the scheduled hours for all employees, as well as the total number of employees scheduled for the selected time period.

Navigating the Schedule Editor

Purpose

eSTART includes the Schedule Editor where you schedule worked and non-worked hours. Using the Schedule Editor, you can:

- Add, edit, and delete shifts.
- Assign employees to groups.
- Add pay codes for worked or non-worked hours.



Areas	Description
Name column	Lists the employee names.
Total Pay Status Hours	Displays total number of hours the employee is expected to work for the selected time period based on pay status.
Sch Hrs. column	Displays total number of scheduled hours by employee for the selected time period, with lunch deducted, if applicable.
Date cells	For each day in the selected time period, displays shift start and end times. A date cell can also display pay codes to identify scheduled non-worked hours.
Scheduled Hours row	Displays total number of scheduled hours for all employees for the selected time period and for each date displayed.
Number of Employees row	Displays the total number of employees used to calculate Total Scheduled Hours.

NOTE

Pay period selections are not available in the Time Period drop-down from the Schedule Editor. Use the **Range of Dates** selection if a broader time period is needed.

- A **Pay Period** is a time period from **1st – 15th** or **16th-31st**.
- A **Schedule Period** is the FLSA week. It is a one week span of time, from Saturday to Friday.

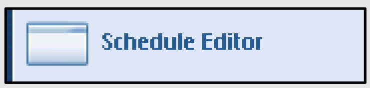
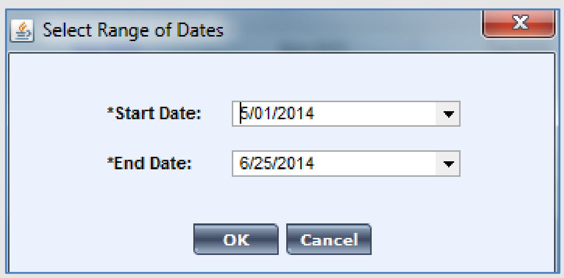
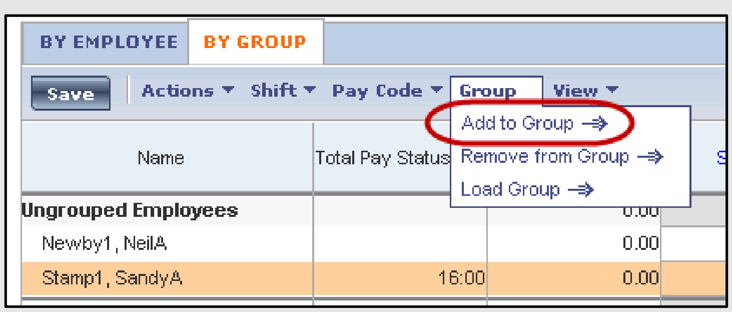
Using Groups to Assign Schedules to Employees

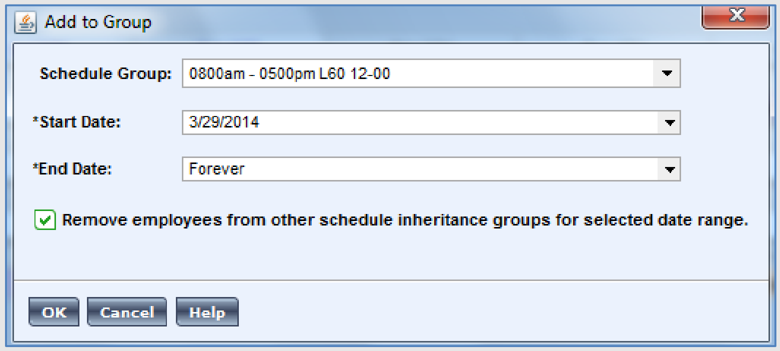
Purpose

When you assign an employee to a schedule group, you specify how long the employee will belong to the group. If there is no defined end to the group assignment, you can indicate that the employee belongs to the group indefinitely.

Exercise

Sandy Stamp is not currently assigned to a schedule group. She works 8:00am - 5:00pm with a 60 minute lunch. Therefore, you will assign her to a schedule group effective on previous month with no end date.

Steps		
1	From the **Related Items** pane, select **Schedule Editor**.	
2	Select **Range of Dates** from the **Time Period** drop-down. Choose the <u>first work day of the previous month</u> as the **Start Date**. The **End Date** will be today's date.	
3	Select the **By Group** tab and then select **Sandy Stamp**.	
4	Select **Group>Add to Group**. OR Right-click and select **Add to Group.**	

Steps		
5	From the Schedule Group drop-down list, select the applicable **schedule group**.	
6	The **Start Date** drop-down defaults to the start date selected from **Time Period.**	
7	In the **End Date** drop-down list, select the last date the schedule group assignment is effective. For the assignment to be in effect with no end date, select **Forever**.	
8	Leave the check mark selected in the **Remove employees from other schedule inheritance groups for the selected date range** box.	
9	Click **OK.** **NOTE:** Notice the name of the page is **ORANGE** in color (as previously discussed) and there is an **ORANGE** asterisk beside the name. This indicates that changes have not been saved.	
10	Click **Save**.	

Tip

You may remove an employee from a Schedule Group by selecting **Remove from Group** from the **Group** menu.

NOTE

If a schedule group is needed, (not in list) contact your Agency Administrator to have it added.

Adding or Editing Shifts Using the Shift Editor

Purpose

When creating and editing more complex schedules, use the Shift Editor. It has tools that make it easier for you to create and edit shifts with several segments, shifts with transfers, shifts that cross the day divide, and other complex shifts.

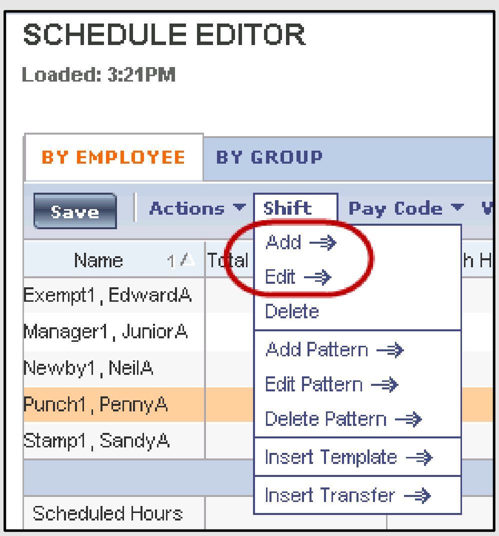
Exercise

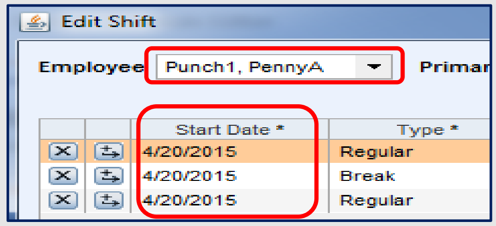
On Monday of the next schedule period, you need **Penny Punch** to work the following shift segments:

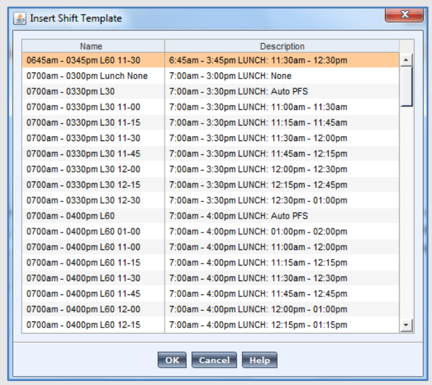
- Regular shift from 8:00 a.m. to 12:00 p.m.
- Lunch break from 12:00 p.m. to 12:30 p.m.
- Regular shift from 12:30 p.m. to 4:30 p.m.

Use the **Shift** drop-down to add or edit the shift to her schedule for **Monday of the next schedule period**.

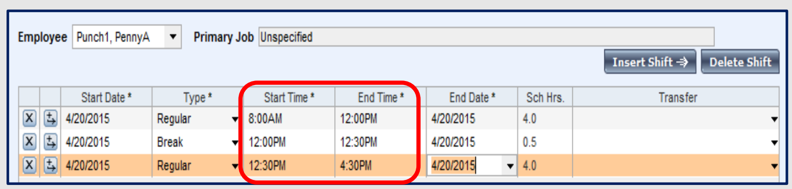
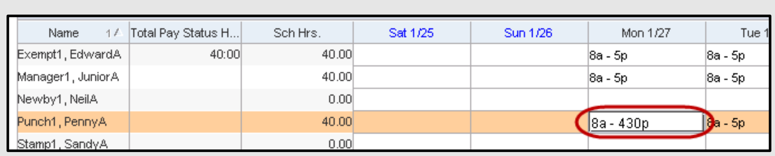
NOTE: Shift times must always be entered in 15-minute increments.

Steps		
1	From the **Related Items** pane, select **Schedule Editor**.	
2	From the **Show** drop-down list, select the specific set of employees. From the **Time Period** drop-down list, select **Next Schedule Period**.	
3	From the **Employee** tab, highlight the row with **Penny Punch.** Click the cell where the shift is to be added.	
4	Select **Shift>Edit** from the **Action** bar or right-click on the shift in the cell and select **Edit>Shift** from the pop-up menu. **NOTE:** If the cell does not contain an existing shift, select **Shift>Add**.	

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>5</td><td>In the Shift Editor, confirm that the correct employee’s name displays in the Employee field and the correct scheduling date displays in the Start Date field.</td><td></td></tr>
<tr><td>6</td><td>Is there already a shift displayed?
No – Go to step 7
Yes – Go to step 8</td><td></td></tr>
<tr><td>7</td><td>Click Insert Shift. Select the appropriate shift template and click OK.

Go to step 9.</td><td></td></tr>
<tr><td>8</td><td>To modify her existing shift to allow 30 minutes for lunch and to leave 30 minutes early, edit the

Break End Time to 1230p
Regular Start Time to 1230p
Shift End Time to 430p

NOTE: Shift times must always be in 15-minute increments.</td><td></td></tr>
<tr><td>9</td><td>Click OK and then click Save.</td><td></td></tr>
</table>

NOTE

Another method for adding the shift is to click in the cell and manually key the shift times, i.e. 8a-5p, 730a-430p.

Tip

Enter time using a 12-hour format with either **am/pm** or **a/p** abbreviations. For example, you can enter 8:00am to 5:00pm or 8a-5p. You can also copy and paste shifts using **Ctrl-C** and **Ctrl-V**.

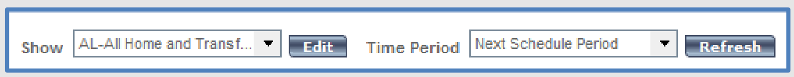
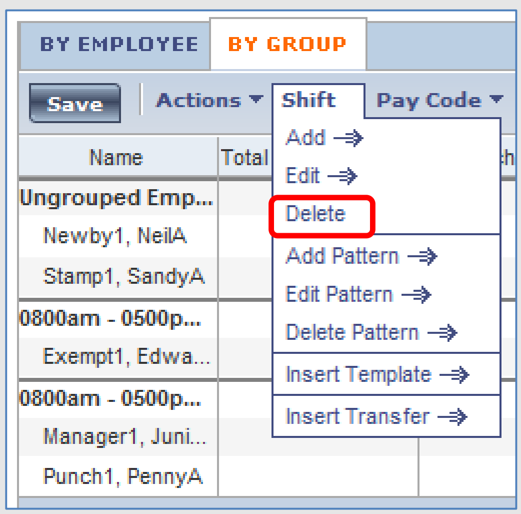
Deleting Shifts from Employees' Schedules

Purpose

Sometimes an employee is unable to work a scheduled shift. When this happens, you need to delete the shift from the employee's schedule to prevent the application from flagging the absence as unexcused.

Exercise

Penny Punch, who is currently scheduled to work on Tuesday of the next schedule period, will not be working on Tuesday. Access the Schedule Editor and delete her schedule for **Tuesday of the next schedule period.**

Steps		
1	From the **Related Items** pane, select **Schedule Editor**.	
2	From the **Show** drop-down list, select the specific set of employees. From the **Time Period** drop-down list, select **Next Schedule Period**.	
3	Locate Penny's row and click the cell in the row under the date that contains the shift you want to delete.	
4	Select **Shift>Delete** or press the **Delete** button on the keyboard to remove the shift.	
5	Click **Save**.	

Scheduling Non-Worked Hours

Purpose

Non-worked hours include time such as sick leave, annual leave, or jury duty. You may schedule your employees' non-worked time when you are made aware of the non-work time.

Exercise

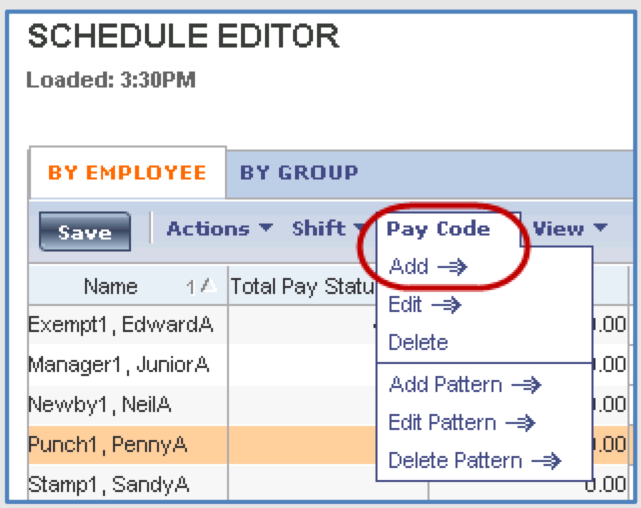
Penny Punch has been called to serve jury duty on **Thursday** of the **Current Schedule Period**. Because you know about it in advance, you want to schedule the time so that you do not forget.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>From the Related Items pane, select Schedule Editor.</td><td></td></tr>
<tr><td>2</td><td>From the Show drop-down list, select All Home and Transferred In.

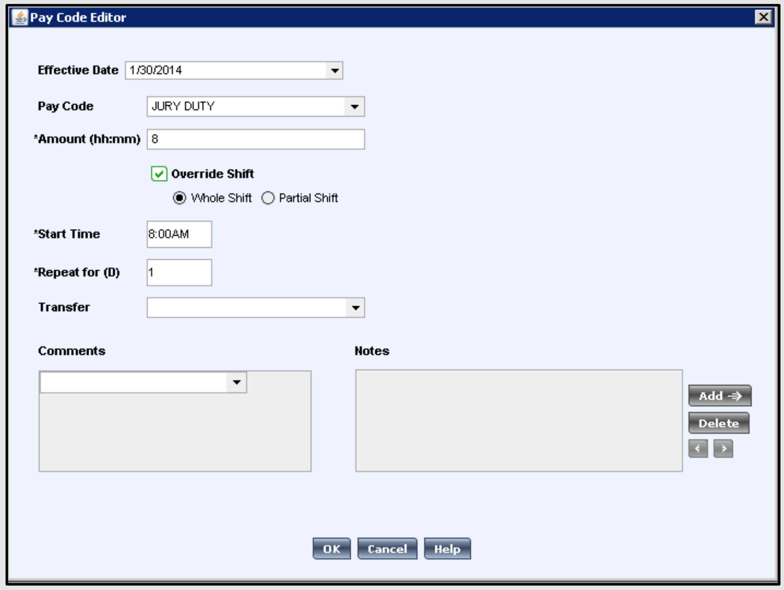
From the Time Period drop-down list, select Current Schedule Period.</td><td>

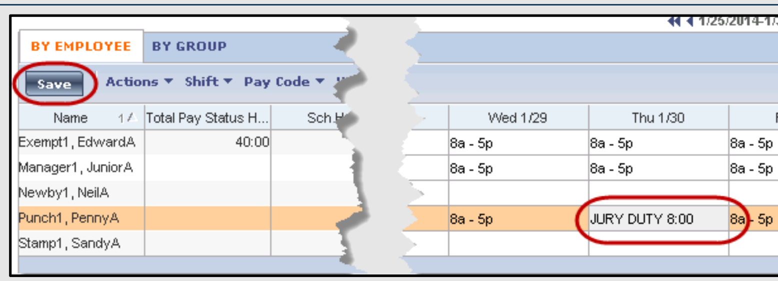

</td></tr>
<tr><td>3</td><td>Locate Penny's row and click the cell in the row where you want to schedule non-worked hours.</td><td>


</td></tr>
<tr><td>4</td><td>From the Action bar, select Pay Code>Add.

NOTE: You may also right-click on the cell and a pop-up menu will display. Select Add>Pay Code.</td><td>


</td></tr>
</table>

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>5</td><td>In the Effective Date field, confirm the date selected. (Or, if incorrect, enter the correct date.)</td><td rowspan="5">
</td></tr>
<tr><td>6</td><td>From the Pay Code drop-down list, select Jury Duty.</td></tr>
<tr><td>7</td><td>In the Amount field, enter 8 hours.</td></tr>
<tr><td>8</td><td>The Override Shift check box is selected.
• To override the employee’s entire shift, select Whole Shift.
• To override part of the employee’s scheduled shift, select Partial Shift.
For this exercise, Whole Shift will remain selected.</td></tr>
<tr><td>9</td><td>In the Start Time field, the shift start time will automatically default.

NOTE: For partial shifts, enter the correct start time of the leave. Be sure to enter am/pm correctly.</td></tr>
<tr><td>10</td><td>Click OK and then click Save.</td><td>
</td></tr>
</table>

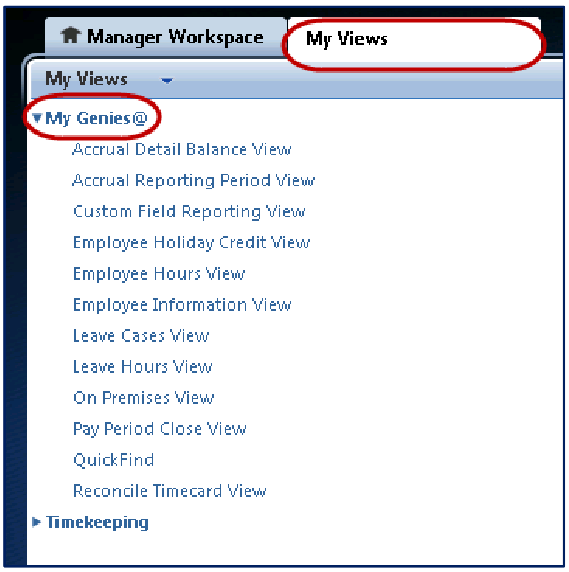
Reviewing Employee Data in eSTART

Purpose

eSTART pages present customized views of employee information in a summarized, easy-to-read format so that you can quickly analyze and respond to time, labor and scheduling needs.

My Genies

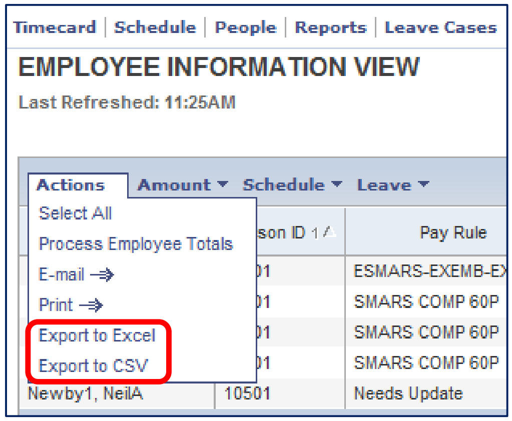
Information found in the My Genies drop-down.



View	Description
Accrual Detail Balance View	Employee leave ending balances for each leave type.
Accrual Reporting Period View	Employee accrual leave balances, pending usages, pending accruals and ending balances, by employee.
Custom Field Reporting View	Includes employee information for pay rules, scheduled group, lunch, employee type, approver, current or arrears.
Employee Holiday Credit View	Holiday Earned and Holiday Taken hours by employee.
Employee Hours View	Employee hours: Regular and Non-Worked, Comp and OT.
Employee Information View	Includes employee information for pay rules, labor account, hire date, employment terms, current or arrears, scheduled group, assigned manager.
Leave Cases View	Includes leave reasons, leave frequency, leave case status, leave category, initial leave request date.
Leave Hours View	Includes total leave hours, leave case status, last date of committed paid and unpaid leave time, leave end date (if one is provided).
On Premises View	Non-exempt employees currently at work.
Pay Period Close View	Final review of your employee time records, displays indicators for employee and manager approvals.
QuickFind	Locate an employee by the name or ID.
Reconcile Timecard	Display exceptions, Holiday skipped, and totals up to date.

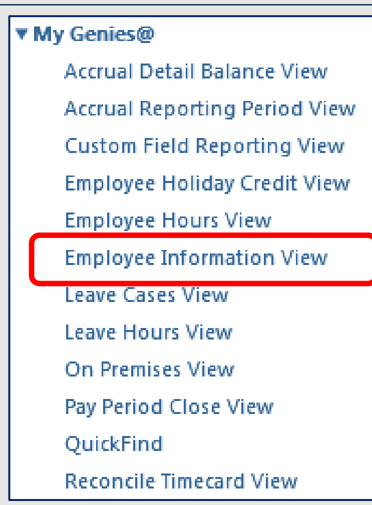
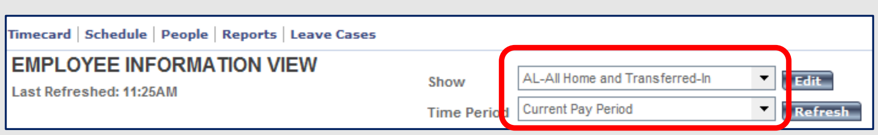
NOTE

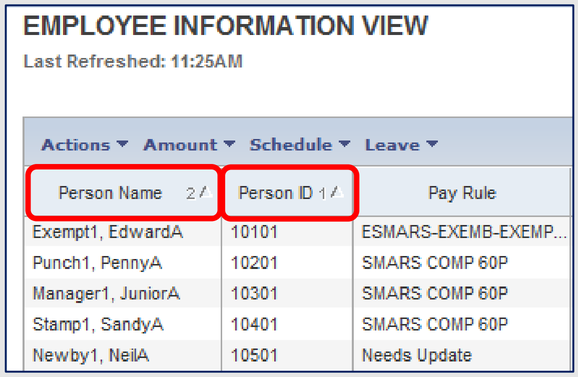
You can also export the data to an Excel (.xls) or CSV (Comma Separated Value) file to make it available to other applications such as Excel.



Exercise

You want to look at how your employees are set up in eSTART.

Steps		
1	From the **Related Items** pane, select **My Views**.	
2	Open the **My Genies** drop-down and choose **Employee Information View**.	
3	From the **Show** drop-down list, select **AL-All Home and Transferred-In**. From the **Time Period** drop-down list, select **Current Pay Period**.	

Steps		
4	To sort information by one or two columns, click the column for the secondary sort first, and then click the column for the primary sort.	

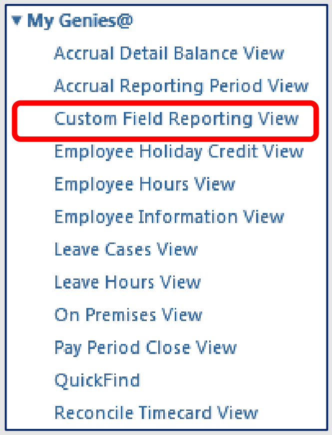
Review the information from **Employee Information View**.

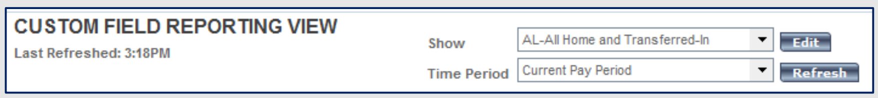
Column	Description
Pay Rule	Indicates how an employee earns time (i.e. Exempt vs. Non-Exempt, Overtime\Comp Time, etc.)
Primary Labor Account	The Agency/Division/Work Location/Manager ID/Job Classification Code to which the employee is assigned.
Employment Terms	Indicates if an employee qualifies for Holidays
Current or Arrears	Indicates if an employee is paid current or in arrears
Schedule Group	Indicates the schedule group an employee belongs to

NOTE: Notice that Neil Newby’s information is incomplete. The Pay Rule column displays “Needs Update” and other information is missing.

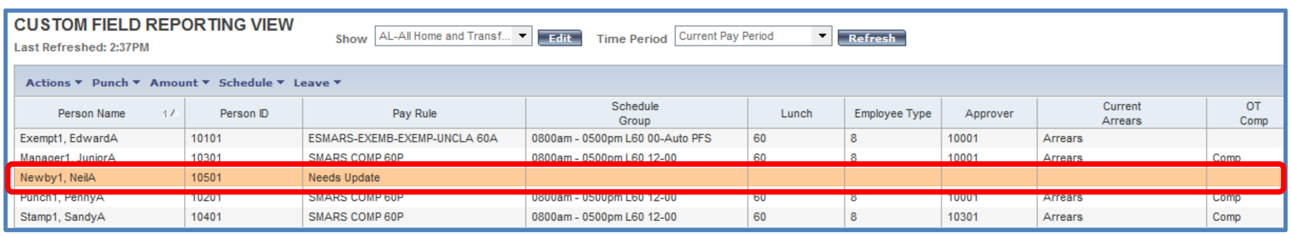
Exercise

Research **Neil Newby** discussed above to troubleshoot his setup in the system.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>Choose Custom Field Reporting View.</td><td>
</td></tr>
<tr><td>2</td><td>From the Show drop-down list, select AL-All Home and Transferred-In.

From the Time Period drop-down list, select Current Pay Period.</td><td>
</td></tr>
</table>

Review the information from **Custom Field Reporting View**.



CUSTOM FIELD REPORTING VIEW
Last Refreshed: 2:37PM
Show AL-All Home and Transf... Edit Time Period Current Pay Period Refresh
Actions Punch Amount Schedule Leave

Person Name	Person ID	Pay Rule	Schedule Group	Lunch	Employee Type	Approver	Current Arrears	OT Comp
Exempt1, EdwardA	10101	ESMARS-EXEMB-EXEMP-UNCLA 60A	0800am - 0500pm L60 00-Auto PFS	60	8	10001	Arrears	
Manager1, JuniorA	10301	SMARS COMP 60P	0800am - 0500pm L60 12-00	60	8	10001	Arrears	Comp
Newby1, NeilA	10501	Needs Update						
Punch1, PennyA	10201	SMARS COMP 60P	0800am - 0500pm L60 12-00	60	8	10001	Arrears	Comp
Stamp1, SandyA	10401	SMARS COMP 60P	0800am - 0500pm L60 12-00	60	8	10301	Arrears	Comp

Column	Description
Pay Rule	Indicates how an employee earns time (i.e. Exempt vs. Non-Exempt, Overtime\Comp Time, etc.)
Schedule Group	Indicates the schedule group an employee belongs to
Lunch	Indicates the length of an employee's lunch period
Employment Type	Indicates the hours for an employee (i.e. 8 is an 8-hour employee)
Approver	Person ID of the employee's manager
Current or Arrears	Indicates if an employee is paid current or in arrears
OT Comp	Indicates if a Non Exempt employees Comp versus Overtime

Notice that **Neil Newby's** information is incomplete. The **Pay Rule column displays "Needs Update"** and other information is missing. Contact your Agency Administrator to have these fields corrected.

Locating Employees Using QuickFind

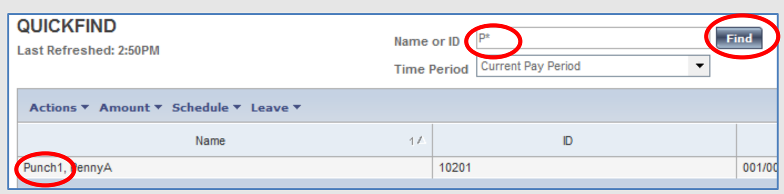
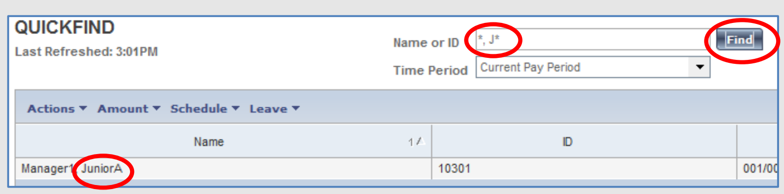
Purpose

When an employee notifies you about an issue with his or her timecard, you can use QuickFind to access the employee's timecard. You can use other eSTART customized views to access timecards, but this page is designed to help you locate an employee by the name or ID. If you are unsure of the spelling of an employee's name or know only some of the digits in an employee's ID number, you can include wildcard characters to help you find the employee with only partial information.

Wildcard Character	Description	Example
? _	A question mark or underscore indicates a single character occupies a position in the search string.	**10??** finds all employees whose ID contains 4-digit numbers starting with 10. **Sm_th** finds all employees whose last name starts with "Sm" and ends with "th" and has one letter in the center.
* %	An asterisk character or a percent symbol indicates multiple characters can occupy a position in the search string.	***, s*** finds all employees whose first name begins with the letter S. **%1** finds all employees whose ID number ends with the number 1.

Exercise

You need to review the timecards for **Junior Manager and Penny Punch**. To quickly access Penny's timecard, access **Related Items>QuickFind** and search for all employees whose last name begins with "**P**". Then try searching for Junior's timecard by searching for employees whose first names begin with "**J**".

Steps		
1	From the **Related Items** pane, select **Quick Find**.	
2	Enter your search criteria in the **Name or ID** box. • To search by last name, enter **P***	
3	Click **Find.**	
4	Enter your search criteria in the Name or ID box. • To search by first name, enter ***,<space> J***	
5	Click **Find**.	

Timekeeping

Other useful information can be found in the **Timekeeping** drop-down.

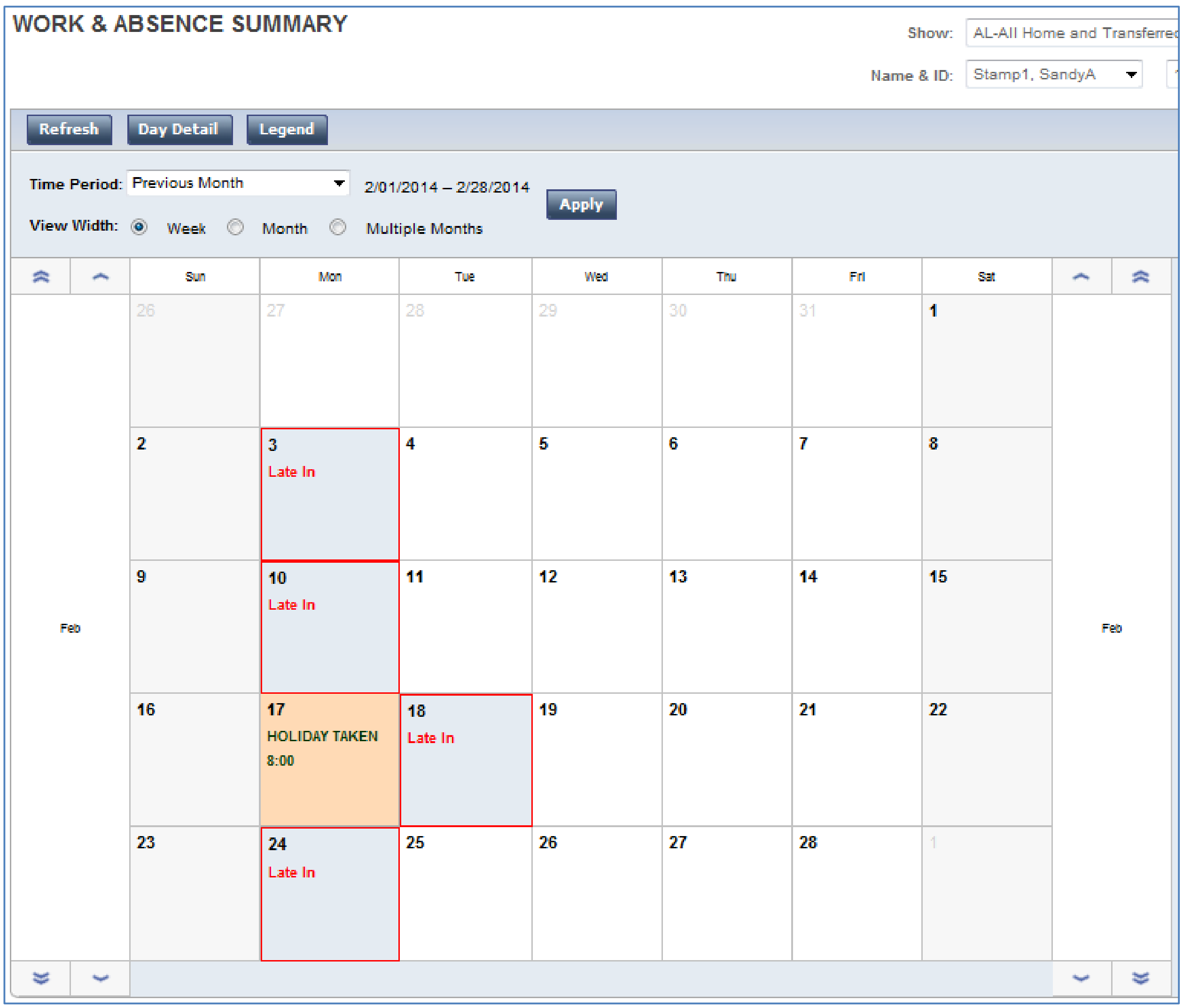
Areas	Description
All WTK Exceptions	This view allows viewing of all timekeeping exceptions for your employees. It contains all possible exceptions in the system. Not all will be used by the State. Reconcile Timecard is preferable to view existing exceptions.
Approvals Summary	This view provides a summary of approvals and exceptions in an employee timecard.
Count All WTK Exceptions	This view allows viewing of the number of exceptions for each type. Again, this view contains all possible exceptions in the system. Most will not be used by the State. The Exceptions widget is preferable to view the number of exceptions.
Work & Absence Summary	This view allows you to identify trends or patterns in worked and scheduled time off for employees in calendar view.

Using the Work & Absence Summary Calendar

Purpose

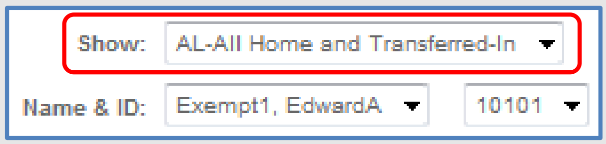
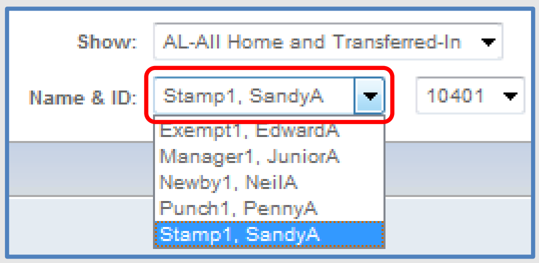
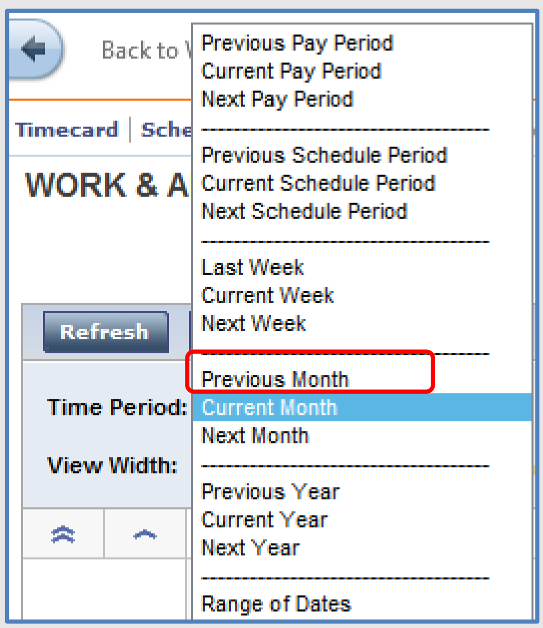
You can use the Work & Absence Summary calendar to identify trends in worked and time off events for employees. The calendar-like display makes it easy for you to see whether an employee has a pattern of taking time off or of arriving late on a specific day of the week. You can see trend information such as the following:

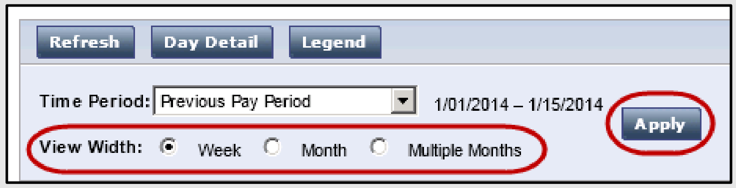
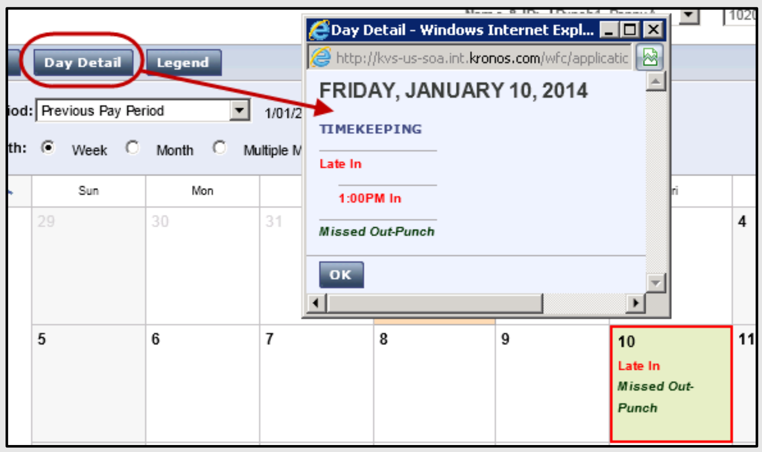
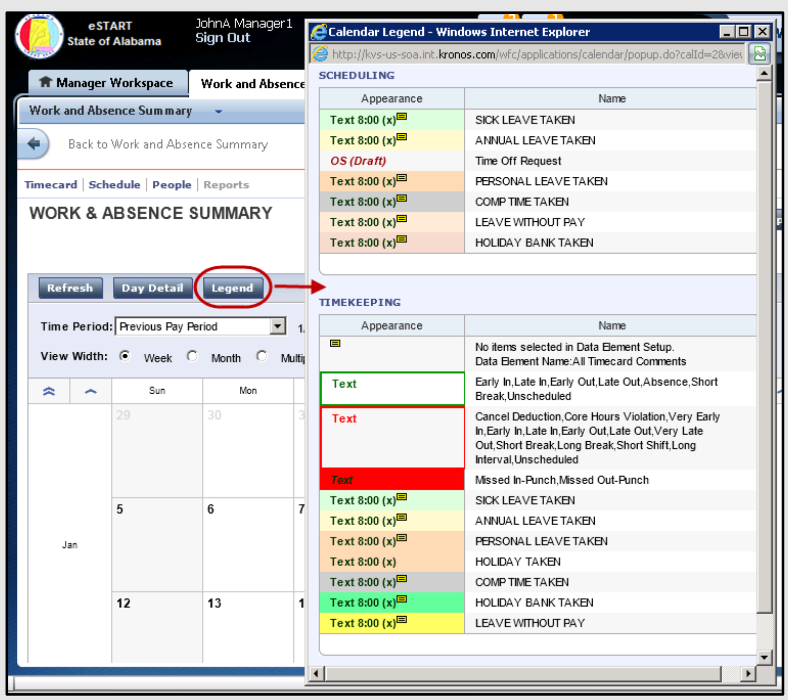
- Number of days the employee has arrived late to work or left early
- Number of days the employee has taken sick or annual leave
- Days the employee has missed punches



Exercise

You are scheduled to deliver a performance review with **Sandy Stamp** this week. Prior to the meeting, you would like to research her calendar for the year. Access the Work & Absence Summary calendar to review the **Sandy's** attendance.

Steps		
1	From the **Related Items** pane, select **Work and Absence Summary**.	
2	Select **All Home and Transferred In** from the **Show** list.	
3	Select **Sandy Stamp** from the **Name & ID** list.	
4	Select the **Previous Month** from the **Time Period** drop-down list.	

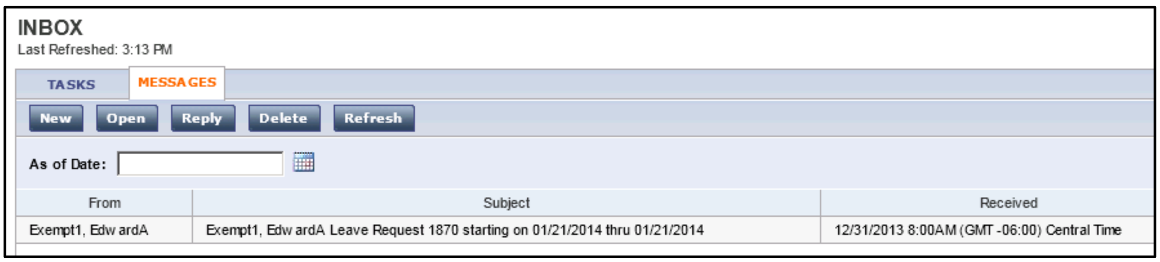
Steps		
5	Select the **View Width** option to review attendance events in a weekly calendar, monthly calendar, or in multiple months. Click **Apply**. For example, to see how many attendance events the employee has over a month, select **Month** and then click **Apply**.	
6	(Optional) Select one or more days and click **Day Detail** for more detailed information.	
7	(Optional) To see a legend of all color and visual indicator meanings, click the **Legend** button.	

Reviewing Time and Attendance Data

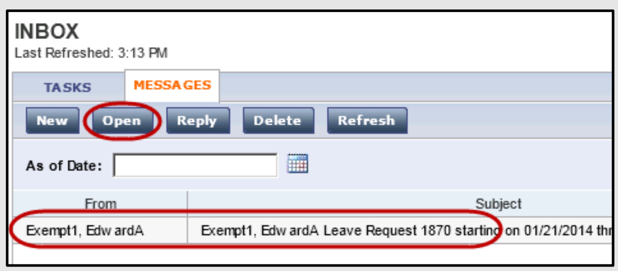
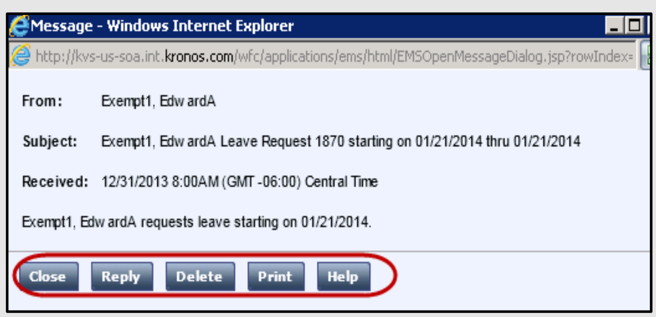
Using the Inbox to View/Send Messages

Purpose

The Inbox allows you to manage tasks and email messages sent via eSTART. In particular, the Messages tab allows you to create, read, reply to, and delete messages using eSTART's internal messaging system. Employee requests for leave are one example of a typical message managers will receive.



Exercise

Steps		
1	From the **Related Items** pane, select **My Inbox**.	
2	From the **Messages** tab, select the message you want to review and click **Open**. **NOTE:** You may also double click to open a message.	
3	What do you want to do? • Click **Close** to close the message. • Click **Reply** to compose a message. • Click **Delete** to remove the message from the Inbox. • Click **Print** to send the message to a printer. • Click **Help** to access online help for this feature.	
4	Close the **Message** window. Then close the **Inbox** tab.	

NOTE: Users who have an Agency email account will also receive these messages in their mailboxes.

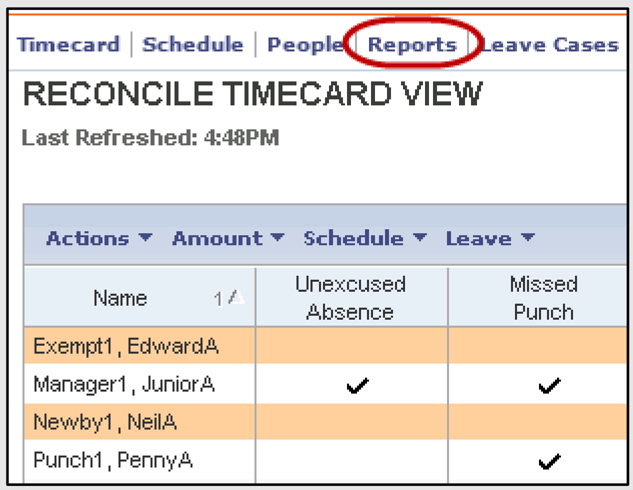
Generating Reports

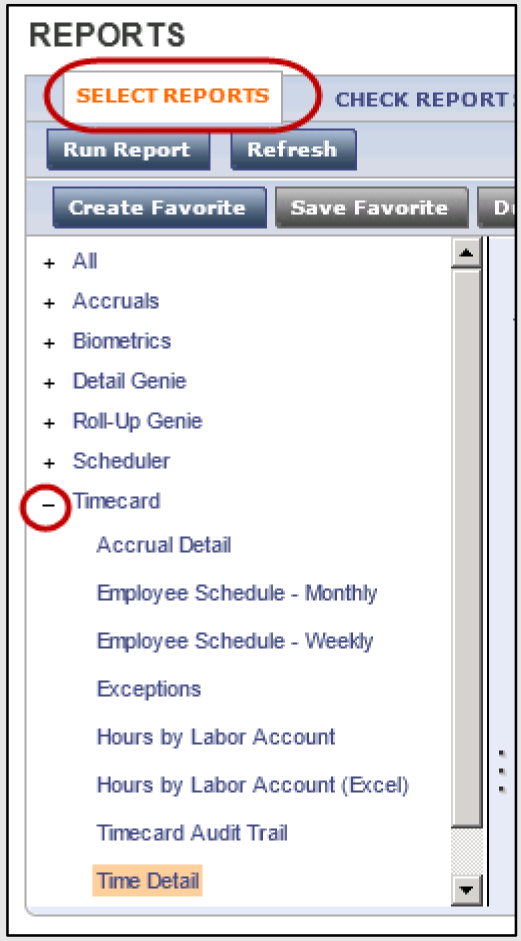
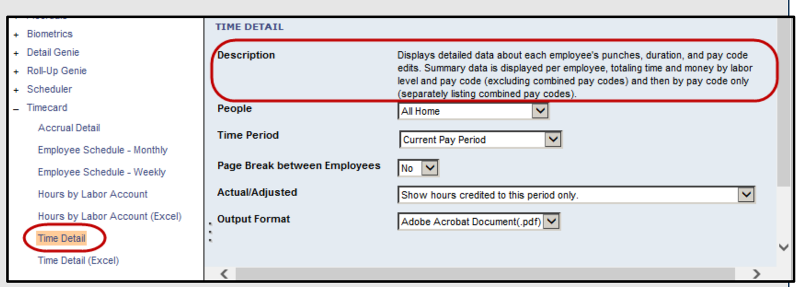
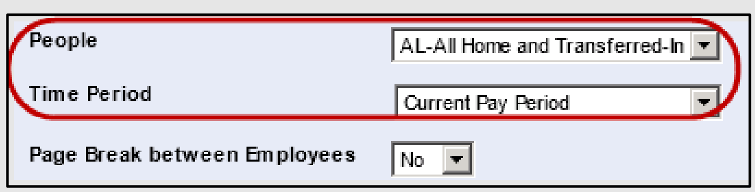
Purpose

You can generate reports on a daily, weekly or pay period basis, or any time you need information to accomplish your business tasks.

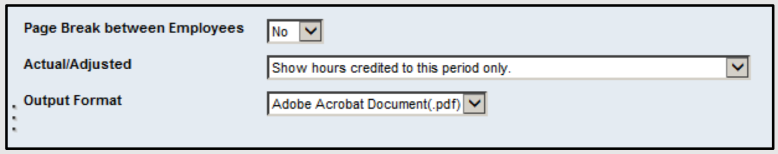
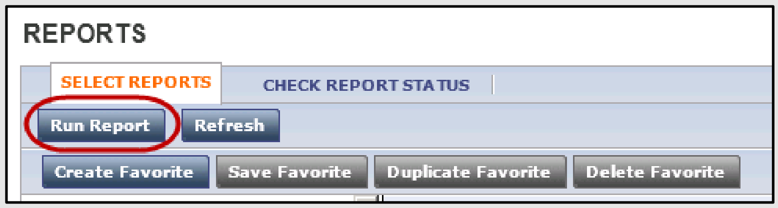
Exercise

For auditing and validation purposes, you want to review all your employees' timecard hours and totals for the pay period in a report format. Select the **Time Detail** report to review this information.

Steps		
1	From the **Related Items** pane, select **Reports Manager**. **NOTE:** You may also run a report for a specific set of employees by selecting the employees in a customized view and clicking the **Reports** quick link.	 

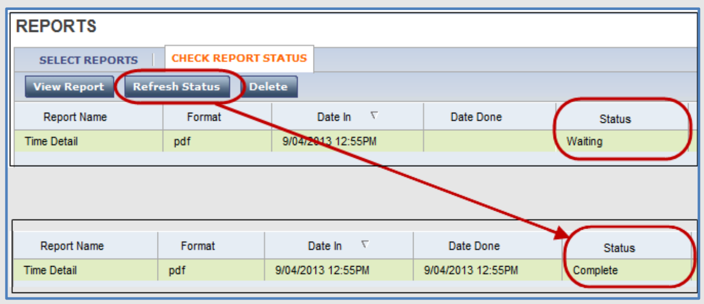
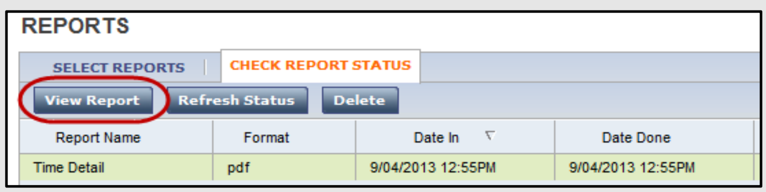
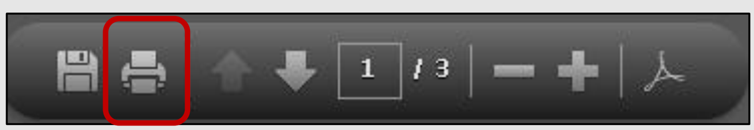
Steps		
2	From the **Select Reports** tab, click the plus **(+)** to the left of the **Timecard** category to display its contents.	
3	Click the **Time Detail** report. **NOTE:** A description of the report displays on the right pane. Also, reports that have (Excel) at the end of their names are available in **Microsoft Excel Document (.xls)** format. All other reports are available in **Adobe Acrobat Document (.pdf)** format.	
4	Select **AL-All Home and Transferred-In** from the **People** drop-down list.	
5	Select **Current Pay Period** from the **Time Period** drop-down list.	

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>6</td><td>Select one or more available options to identify the report information you need.

NOTE: Options may vary by report.</td><td rowspan="2">
</td></tr>
<tr><td>7</td><td>This report is only available in Adobe format, so the Output Format field cannot be changed.</td></tr>
<tr><td>8</td><td>To generate a report, click Run Report.</td><td>
</td></tr>
<tr><td>9</td><td>After selecting Run Report, the Check Run Status tab displays.

The Status column displays Waiting.

Click Refresh Status.

The Status column displays Complete or Failed once the application has finished the report.</td><td>
</td></tr>
<tr><td>10</td><td>Once Status is Complete, click on the report name to select it and either:
Click the View Report button to use menu options.
Or double-click the report name to view.</td><td>
</td></tr>
<tr><td>11</td><td>To print the report to a local printer, select the Print button from the menu that displays on the report or use your browser print functions. The report may also be saved.</td><td>
</td></tr>
</table>

Here is an example of a Time Detail report.

Time Detail

Time Period:	Current Pay Period	Data Up to Date:	11/10/2014 1:29:56 PM
Query:	AL-All Home and Transferred-In	Executed on:	11/10/2014 1:29PM GMT-06:00
Actual/Adjusted:	Show hours credited to this period only.	Printed for:	JohnA.Manager1
		Insert Page Break After Each Employee:	No

Employee: Exempt1, EdwardA **ID:** 10101 **Time Zone:** Central
Status: Active **Status Date:** 1/1/2013 **Pay Rule:** ESMARS-EXEMB-EXEMP-UNCLA 60A
Primary Account **Start** **End**
001/0000/100010/10001/-/-/- 1/1/2013 Forever

Date/Time	Apply To	In Punch	In Exc	Out Punch	Out Exc	Override Amount	Adj/Ent Amount	Money Amount	Day Amount	Totaled Amount	Cum. Tot. Amount
Xfr/Move: Account		*Comment*		*Xfr: Work Rule*							
11/3/2014		8:00:00 AM		5:00:00 PM						8:00	8:00
11/4/2014		8:00:00 AM		5:00:00 PM						8:00	16:00
11/5/2014		8:00:00 AM		5:00:00 PM						8:00	24:00
11/6/2014		8:00:00 AM		5:00:00 PM						8:00	32:00
11/7/2014		8:00:00 AM		5:00:00 PM						8:00	40:00
11/10/2014		8:00:00 AM		5:00:00 PM						8:00	48:00
11/11/2014 12:00 AM	Veterans Day						8:00				56:00
11/12/2014		8:00:00 AM		5:00:00 PM						8:00	64:00
11/13/2014		8:00:00 AM		5:00:00 PM						8:00	72:00
11/14/2014		8:00:00 AM		5:00:00 PM						8:00	80:00

Labor Account Summary	Pay Code	Hours	Money	Days
001/0000/100010/10001/-/-/-				
	HOLIDAY EARNED	8:00		
	HOLIDAY TAKEN - EXEMPT	8:00		
	REGULAR	72:00		
	Total NonWorked Time	8:00		
Combined Pay Code Summary	**Pay Code**	**Hours**	**Money**	**Days**
	Total NonWorked Time	8:00		
Totals:		8:00	$0.00	0.00

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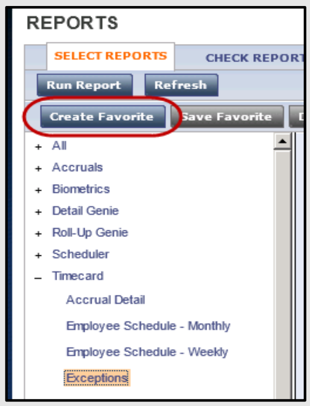
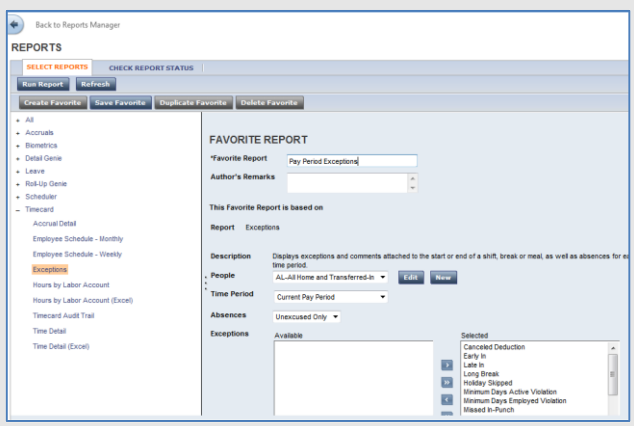
Page 1

Setting Up Report Favorites

If you run the same report with the same options regularly, you can established the report as a favorite. You can run the report as needed without having to reset your options. Favorites display as a new category at the top of the list.

Exercise

Since you use a modified version of the Exceptions report often, you would like to retain the criteria for regular use. You decide to save this report as a favorite.

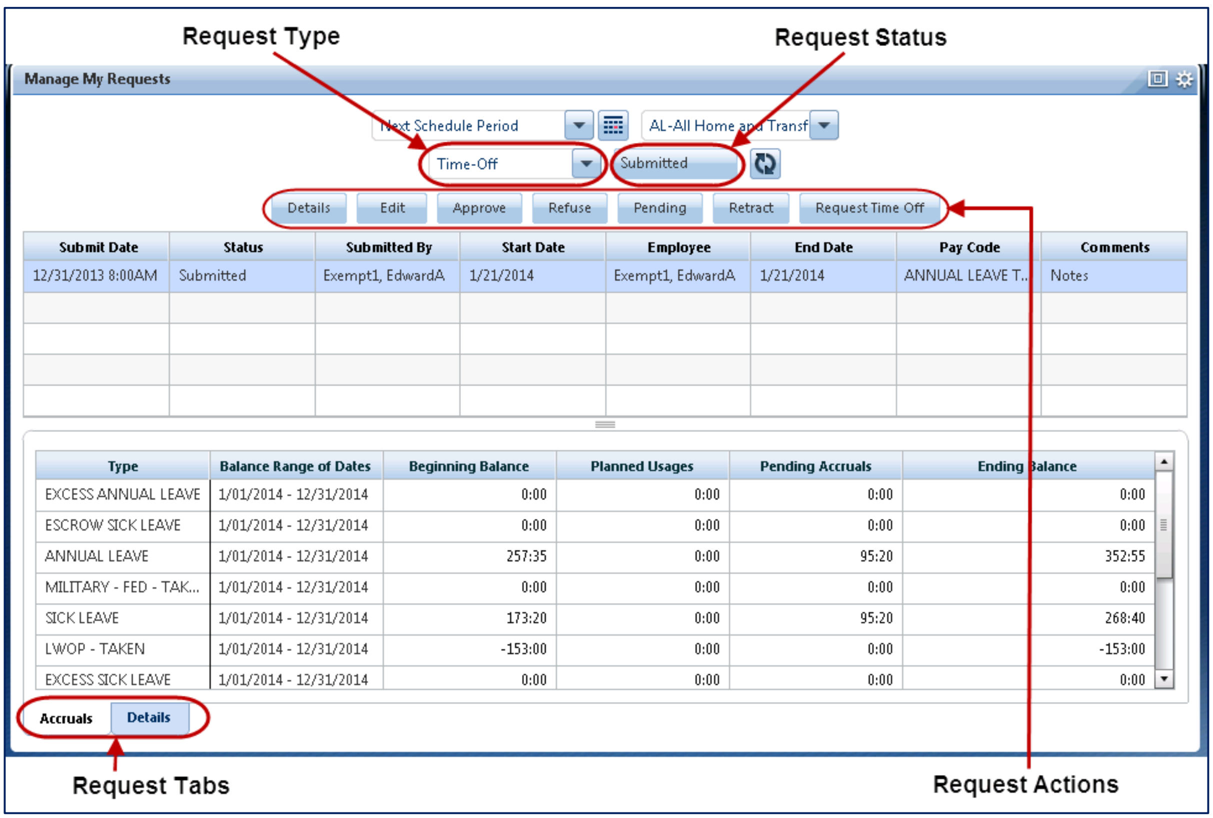
<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>Select the Exceptions report.</td><td rowspan="2">
</td></tr>
<tr><td>2</td><td>Click Create Favorite.</td></tr>
<tr><td>3</td><td>In the Favorite Report field, name the report Pay Period Exceptions.</td><td rowspan="3">
</td></tr>
<tr><td>4</td><td>In the Author's Remarks field, enter descriptive data (optional).</td></tr>
<tr><td>5</td><td>Select the options that you would like to see in the report.
All options are in the Selected window. If only certain options are needed, move All selections to the Available window, then select the options that are desired. Hold down the CTRL key for each selection. Use the left and right arrows to move the selections to the Selected pane.
NOTE: Options may vary by report.</td></tr>
<tr><td>6</td><td>Click Save Favorite.</td><td>
</td></tr>
<tr><td>7</td><td>Confirm that the report is displayed in the Favorites category.</td><td>
</td></tr>
</table>

Working with Time Off Requests

Using the Manage My Requests Widget

Purpose

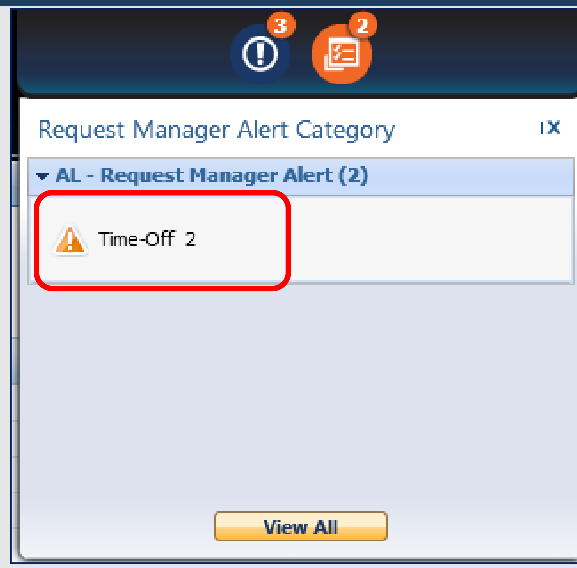
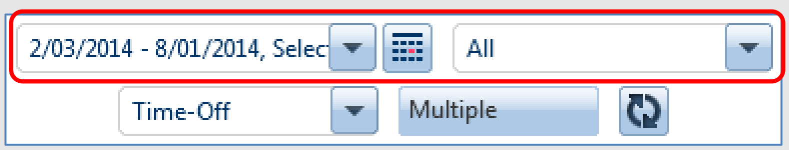
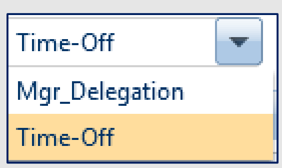
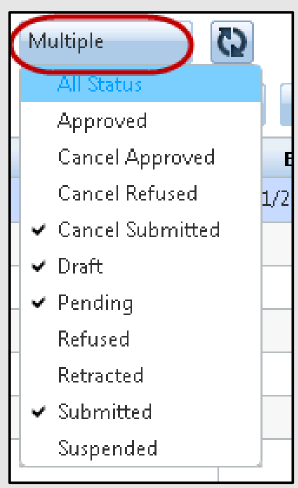
The Manage My Requests widget summarizes all requests in one window and provides all supporting information needed to process requests. Requests can come from employees or other managers, such as, manager delegation requests. In the Manage My Requests widget, managers can process requests one at a time or simultaneously process multiple requests of the same type. Managers can also filter the list of requests displayed in the widget and sort the list by column.

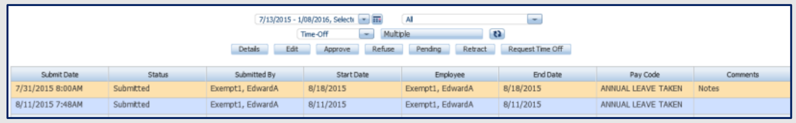
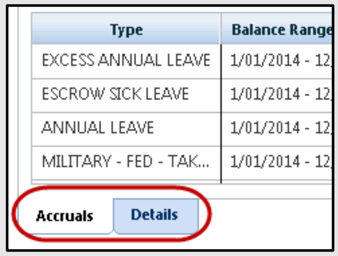
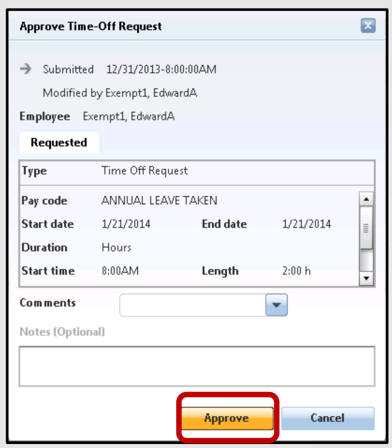
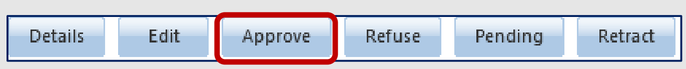


Component	Description
Request type	This field enables managers to filter the requests that are listed based on the request type.
Request status	This field enables managers to filter the requests that are listed based on the request status.
Request tabs	These tabs display different information relevant to the selected request.
Request actions	These buttons enable managers to perform actions related to processing employee requests.

Exercise

Edward Exempt is requesting time off. You want to view each of his requests and approve them.

Steps		
1	To access the **Manage My Requests** widget, click on the **Requests** icon (on the right) and choose **Time Off.**	
2	Leave the default values or select new values in the **Time Period** and **Show** fields.	
3	Confirm the default values, or select new values in the Request type and Request status fields. **NOTE**: • The Request type field lets you select the type of requests you are viewing (Mgr_Delegation or Time-Off). • The Request status button lets you limit which statuses display. For example, you may only want to view Submitted requests. For this exercise, leave defaults.	 

Steps		
4	Edward has two requests. The first one in the list is selected.	
5	To view Edward's accrual balances, select the **Accruals** tab.	
6	To view the detail on the selected request, select the **Details** tab.	
7	To approve, refuse, or perform another action on the selected request(s), click the applicable button. For this exercise, select **Approve.**	
8	In the **Approve Time Off Request** page that displays, verify the information and, if applicable, select a comment from the **Comments** drop-down list and/or enter text in the **Notes** field. Also, verify requests for Hours were submitted in <u>15-minute increments</u> and that the start time is in <u>15-minute increments</u>.	
9	Click the **Approve** button.	
10	Select the remaining request. Click the **Approve** button.	
11	The **Approve Time Off Request** page displays for this request. Click **Approve.**	
12	Click **Refresh** to update the Alert icon.	
13	Close the widget.	

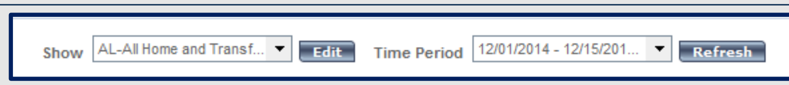
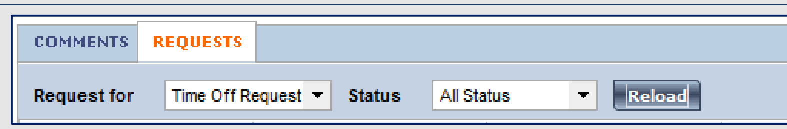
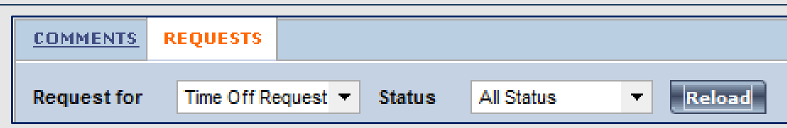
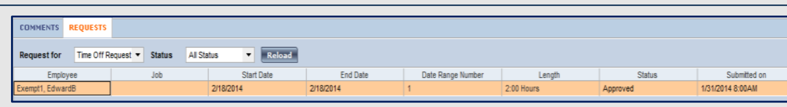
Editing Time Off Requests from the Schedule Editor

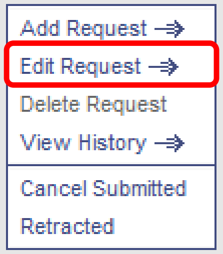
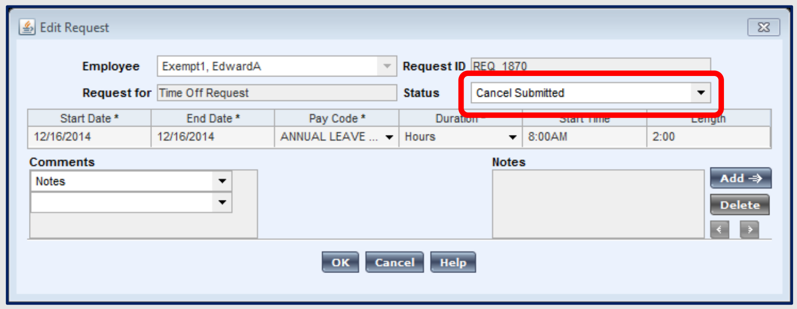
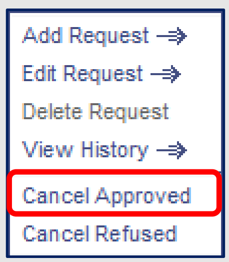
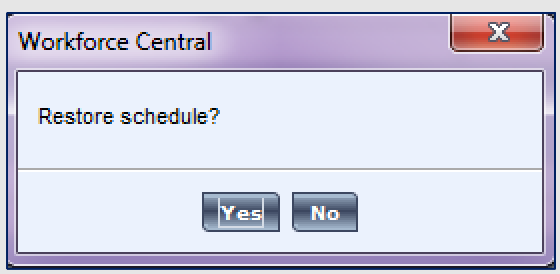
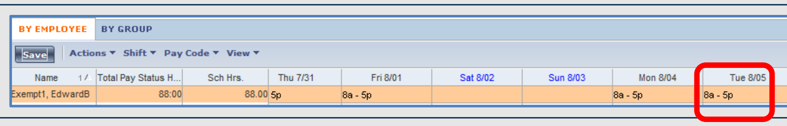
Purpose

Another method for approving a time off request is from **Related Items>Schedule Editor.** One benefit of using this option is you can view the schedules of your employees for that time period. You can make sure you have coverage during the time period.

Exercise

Edward decided he doesn't need this time off after all but he is off site today and the request needs to be cancelled. As his manager, you may cancel the request on his behalf.

Steps		
1	Go to **Related Items > Schedule Editor.** Select **Maximize** button to maximize the widget.	
2	Change the **Time Period** to **Range of Dates.** Then select the date range that coincides with the time off request. (**Edward's request is for Tuesday of the Next Pay Period.)** **NOTE:** Requests are retrieved below using this time period setting. It may be necessary to modify this selection to see particular requests.	
3	In the lower portion of the screen, select the **Requests** tab.	
4	**NOTE:** This portion of the screen can be resized by clicking the mouse on the three dots in the center and dragging them upward.	
5	From the **Request For** drop-down, select **Time Off Requests.** Leave the **Status** drop-down defaulted to **All Status.** Select **Reload.**	
6	The request previously approved for **Edward Exempt** displays.	

Steps		
7	Right-click on the row to display a menu of options. In the lower portion of the menu are items that may be selected to change the status of the request. **NOTE:** Options will vary based on the current status of the request.	
8	Choose **Edit Request** to display further information about the request. The status of the request may be changed from this window.	
9	Choose **Cancel Submitted** from the **Status** drop-down. Then click **OK.** Click on the **Save** button. **NOTE:** The employee may also request the cancellation.	
10	Highlight the row again. Status is now **Cancel Submitted.** Right-click on the row to display the menu. Select **Cancel Approved.** The **Restore Schedule** message box displays. Select **Yes** to restore the original schedule**.**	 
11	Notice that Edward's original schedule has been restored.	
12	**Save** the Schedule Editor page.	
13	Close the **Schedule Editor** tab.	

Finalizing Timecards

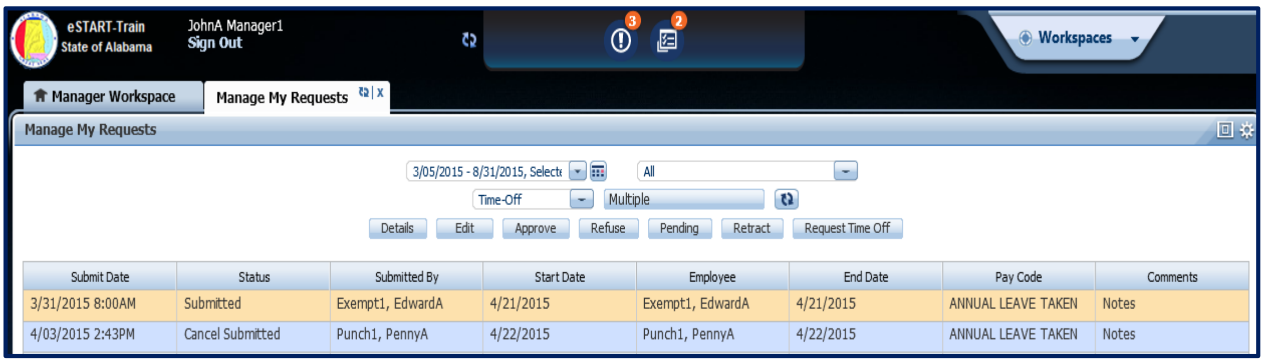
Reviewing Time Data at the End of the Pay Period

Purpose

Preparing to approve the timecards is extremely important to ensure that your employees' time and leave events are accurate. Several tools are available in eSTART to aid in this process.

Manage My Requests

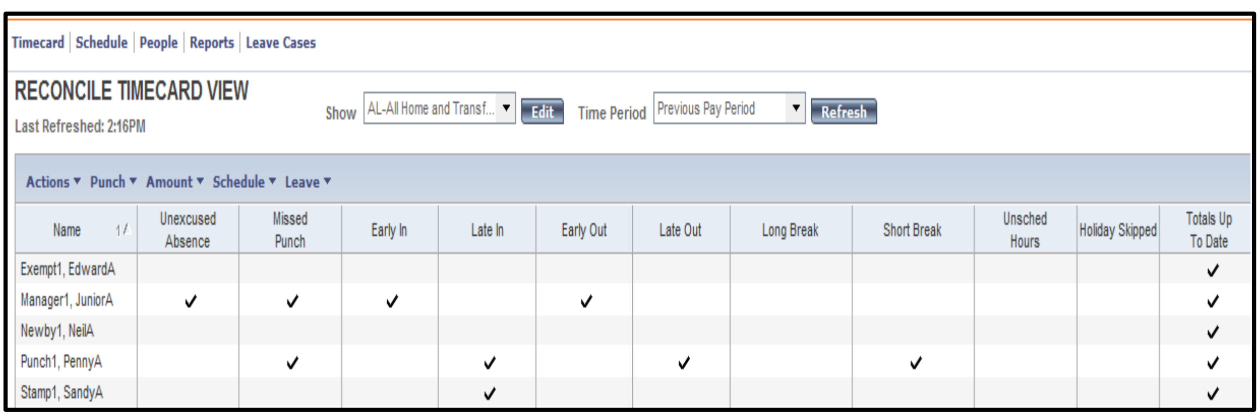
Access the **Manage My Requests** widget to ensure that all time off requests have been appropriately acted upon. This widget is accessed from the **Request Manager alert icon** or from **Related Items>Manage My Requests**. Any requests in Submitted or Cancel Submitted status must be addressed.



Submit Date	Status	Submitted By	Start Date	Employee	End Date	Pay Code	Comments
3/31/2015 8:00AM	Submitted	Exempt1, EdwardA	4/21/2015	Exempt1, EdwardA	4/21/2015	ANNUAL LEAVE TAKEN	Notes
4/03/2015 2:43PM	Cancel Submitted	Punch1, PennyA	4/22/2015	Punch1, PennyA	4/22/2015	ANNUAL LEAVE TAKEN	Notes

Reconcile Timecard

As you have already seen, the **Reconcile Timecard** widget helps you to identify timecard discrepancies at the end of a pay period so that you can perform final edits. You must correct all exceptions before time data is signed off by Administrators. Otherwise, employees may not get paid correctly for that pay period. This view is accessed from **Related Items>Reconcile Timecard** or **Related Items>My Views>My Genies>Reconcile Timecard.**



Name	Unexcused Absence	Missed Punch	Early In	Late In	Early Out	Late Out	Long Break	Short Break	Unsched Hours	Holiday Skipped	Totals Up To Date
Exempt1, EdwardA											✓
Manager1, JuniorA	✓	✓	✓		✓						✓
Newby1, NeilA											✓
Punch1, PennyA		✓		✓		✓		✓			✓
Stamp1, SandyA				✓							✓

Employee Hours View

The **Employee Hours View** widget is useful for verifying that your employees have the correct number of hours for the pay period. Any compensatory time or overtime earned by an employee may be viewed here as well. This view is accessed from **Related Items>My Views>My Genies>Employee Hours View.**

EMPLOYEE HOURS VIEW
Last Refreshed: 2:36PM
Show AL-All Home and Transf... Edit Time Period Previous Pay Period Refresh

Actions ▾ Punch ▾ Amount ▾ Schedule ▾ Leave ▾

Person Name	Person ID	Pay Rule	Regular Hours	Non Worked Hours	Reg & Non Worked	OT 1.5	OT 1.0	Comp 1.5	Comp 1.0	Total Hours
Exempt1, EdwardA	10101	ESMARS-EXEMB-EXEMP-UNCLA 60A	79:00	10:00	89:00					89:00
Manager1, JuniorA	10301	SMARS COMP 60P	72:00	16:00	88:00					88:00
Newby1, NeilA	10501	Needs Update								
Punch1, PennyA	10201	SMARS COMP 60P	80:00	8:00	88:00			0:30		88:30
Stamp1, SandyA	10401	SMARS COMP 60P	77:00	8:00	85:00					85:00

Note that the total hours for Sandy Stamp are fewer than the norm for the pay period and Edward Exempt's total hours are more than the norm. Complete the exercise to research and correct these issues.

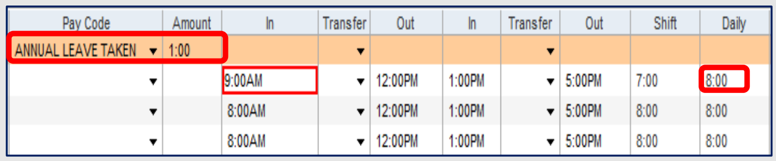
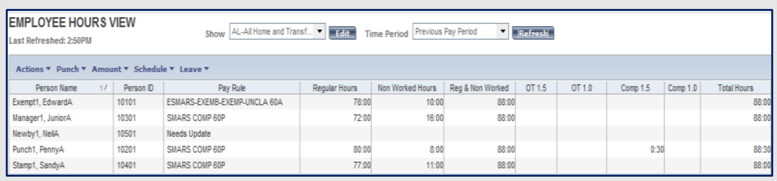
Exempt employees are assigned to an Auto-PFS schedule, so their lunch time is automatically deducted. When a time off request with a midday or partial day time frame is approved, the system determines whether the employee's remaining shift contains at least 4:01 consecutive hours, either in the morning or afternoon portion of the schedule. If the employee's remaining shift does not contain at least 4:01 consecutive hours, the lunch will not be auto-deducted which may require manual edits by the manager. Such is the case with Edward Exempt.

Exercise

The total hours of Sandy Stamp and Edward Exempt are not correct.

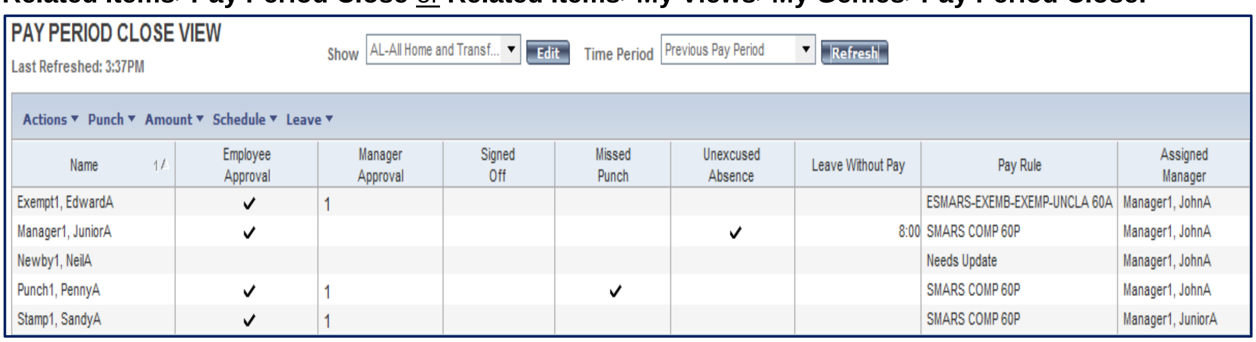
<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>Select Edward Exempt and Sandy Stamp in the list, right-click and select Timecard.</td><td></td></tr>
<tr><td>2</td><td>The timecard page displays. Note that one of the dates in Edward's timecard shows 9 total hours instead of 8. This is due to a midday partial time off request.
The lunch time was not auto-deducted since neither the morning nor afternoon shift was at least 4:01 hours.</td><td>
<table>
<tr><th>Pay Code</th><th>Amount</th><th>In</th><th>Transfer</th><th>Out</th><th>In</th><th>Transfer</th><th>Out</th><th>Shift</th><th>Daily</th></tr>
<tr><td></td><td></td><td>8:00AM</td><td></td><td>11:00AM</td><td></td><td></td><td></td><td>3:00</td><td></td></tr>
<tr><td>ANNUAL LEAVE TAKEN</td><td>2:00</td><td>11:00AM</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td>1:00PM</td><td></td><td>5:00PM</td><td></td><td></td><td></td><td>4:00</td><td>9:00</td></tr>
</table>
</td></tr>
<tr><td>3</td><td>Change the 1pm time in the timecard to 2pm.
NOTE: This correction may also be made to the schedule via the Schedule Editor.</td><td>
<table>
<tr><th>Pay Code</th><th>Amount</th><th>In</th><th>Transfer</th><th>Out</th><th>In</th><th>Transfer</th><th>Out</th><th>Shift</th><th>Daily</th></tr>
<tr><td>ANNUAL LEAVE TAKEN</td><td>2:00</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td>8:00AM</td><td></td><td>11:00AM</td><td></td><td></td><td></td><td>3:00</td><td></td></tr>
<tr><td></td><td></td><td>2:00PM</td><td></td><td>5:00PM</td><td></td><td></td><td></td><td>3:00</td><td>8:00</td></tr>
</table>
</td></tr>
<tr><td>4</td><td>Select Actions>Calculate Totals to verify the hours are now correct.
If correct, Save.</td><td></td></tr>
<tr><td>5</td><td>Right-click on the punch, select Add Comments and choose Time Off Request Adjustment. Save the change.</td><td></td></tr>
</table>

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>6</td><td>Scroll to Sandy Stamp's timecard.</td><td></td></tr>
<tr><td>7</td><td>Sandy Stamp's timecard contains "late in" exceptions and does not have the correct total hours for the pay period.

Add one hour of Annual Leave to Sandy's timecard for each day that she was late.</td><td>
</td></tr>
<tr><td>8</td><td>Select the Insert Row button for each of the dates.
Select Annual Leave Taken from the Pay Code drop down.
Key 1 in the Amount column for each date.
Select Actions>Calculate Totals to confirm that Sandy's time is now correct.
Save the timecard.</td><td>
</td></tr>
<tr><td>9</td><td>Select Back to My Views and choose Employee Hours View. Verify that total hours are now correct.</td><td>
</td></tr>
</table>

<u>Pay Period Close View</u>

The **Pay Period Close** widget is also useful for making a final review of your employee time records and displays indicators for employee and manager approvals. You can access employee timecards from either widget to make final corrections and approve employee timecards. This view is accessed from **Related Items>Pay Period Close** <u>or</u> **Related Items>My Views>My Genies>Pay Period Close.**



Name	Employee Approval	Manager Approval	Signed Off	Missed Punch	Unexcused Absence	Leave Without Pay	Pay Rule	Assigned Manager
Exempt1, EdwardA	✓	1					ESMARS-EXEMB-EXEMP-UNCLA 60A	Manager1, JohnA
Manager1, JuniorA	✓				✓	8:00	SMARS COMP 60P	Manager1, JohnA
Newby1, NeilA							Needs Update	Manager1, JohnA
Punch1, PennyA	✓	1		✓			SMARS COMP 60P	Manager1, JohnA
Stamp1, SandyA	✓	1					SMARS COMP 60P	Manager1, JuniorA

NOTE
A reminder to approve timecards will be sent to all employees' inbox the day after the end of the pay period. Users who have an Agency email account will also receive these messages in their mailboxes.

Approving Timecards

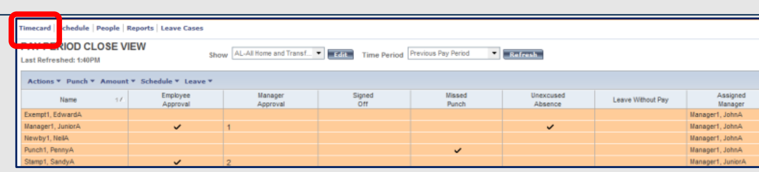
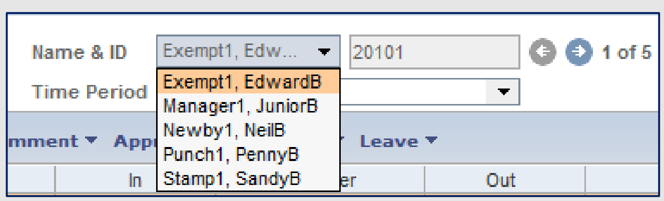
Purpose

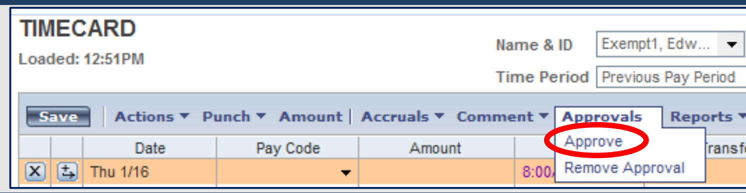
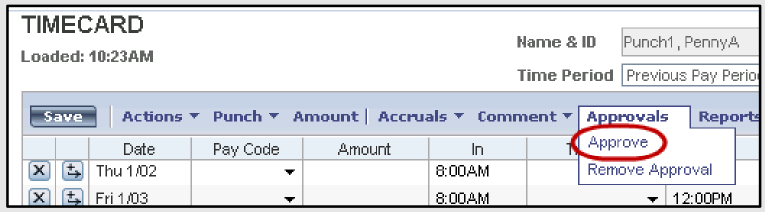
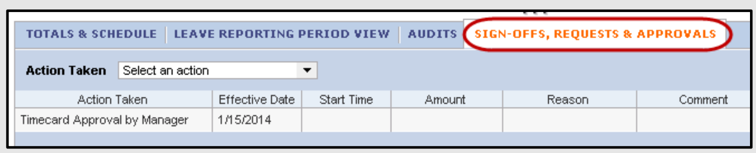
After you finish editing your employees' timecards, you need to approve them to indicate to Payroll that they are ready for processing. After you approve a timecard, the employee cannot make any edits unless you remove your approval.

Exercise

You have reviewed and performed all necessary edits to your employees’ timecards. You now approve the timecards for the previous pay period on each timecard.

NOTE: As a rule, your non-exempt and hourly employees should have approved their own timecards before you approve them. For purposes of this exercise, employee approval has not been completed.

Steps		
1	**Pay Period Close** should still be open from the previous exercise. **NOTE:** You may also use **Reconcile Timecard** for selecting your employees.	 
2	From the **Show** drop-down list, select **Al-All Home and Transferred-In**. From the **Time Period** drop-down list, select **Previous Pay Period**.	
3	Select all the employees in the list, select **Timecard** from the Quick Links menu.	
4	The timecard of the first person in the list displays, but all are in the **Name & ID** drop-down. There is also a scroll bar to the right that can be used to move between the employees’ timecards. • Review outstanding exceptions • Confirm total number of hours • Address any other changes needed	

Steps		
5	On the first employee, select **Approvals>Approve**.	
6	Scroll to the next employee in the list and choose **Approvals>Approve.** **NOTE:** Any remaining exceptions on the timecard must be addressed before approving.	
7	To confirm the approval status on a timecard, click the **Sign-offs, Requests & Approvals** tab and review the **Timecard Approval by Manager** information.	
8	Return to the **Pay Period Close** genie and select the **Refresh** button. The number "1" should display in the **Manager Approval** column for all employees whose timecards were approved.	
9	Close the **My Views** tab.	

Best Business Practice

Each non-exempt or hourly employee must approve his or her timecard. This helps to ensure its accuracy before manager approval is applied.

Performing Additional Manager Tasks

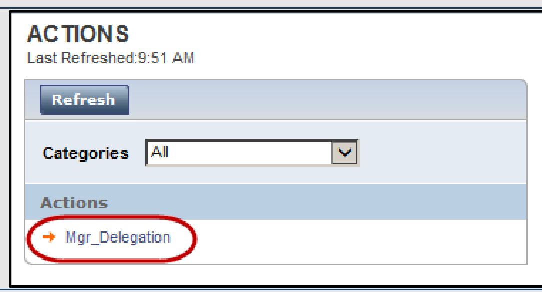
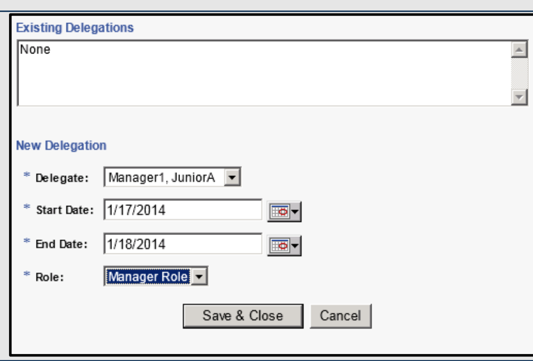
Requesting Backup Coverage

Purpose

You can temporarily delegate your manager tasks in eSTART to another manager. The other manager can perform your tasks using their own user names and passwords. For example, they can modify schedule shifts for absent employees, or review, edit and approve timecards. This allows the business process to keep moving even when you are not there. All edits they perform are recorded and assigned to their names for audit purposes.

Exercise

You are out of the office for two days. You send a delegation request to **Junior Manager** so that you can temporarily assign your timekeeping tasks to him. This will ensure that your employees' timecards are processed for payroll on a timely basis.

Steps		
1	From the **Related Items** pane, select **Temporary Delegation**.	
2	From the list of actions, select **Mgr_Delegation**.	
3	The **Create Delegation** window opens. **NOTE:** If another delegation assignment exists, click **Create New Delegation**.	
4	From the **Delegate** drop-down list, select **Junior Manager**. Select **today's date** from the **Start Date** field and **tomorrow's date** from the **End Date** field. Select **Manager Role** from the Role drop-down list.	
5	Click **Save & Close**. The application sends the delegation request to the other manager's Inbox.	

Accepting or Declining Backup Coverage Requests

Purpose

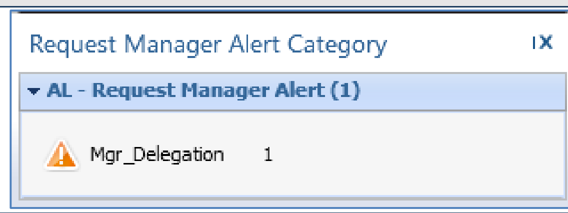
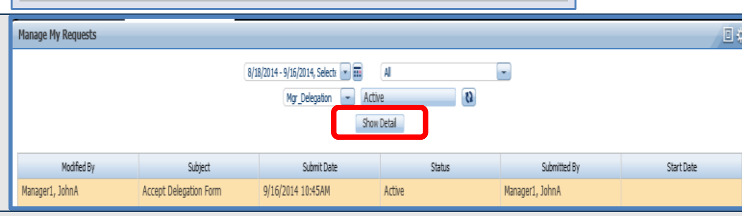
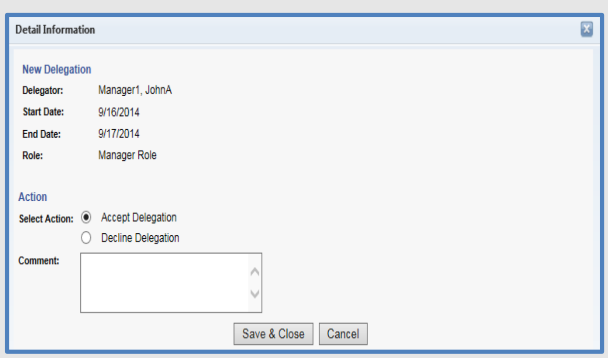
When another manager sends you a request to cover his or her timekeeping and scheduling tasks, the application automatically places a task in your Inbox. The delegation request specifies the start and end dates and the role you will assume. You can access the request to accept or decline from the My Inbox widget.

> **NOTE**
>
> A message will also display from **My Inbox>Tasks.** The request may also be accepted or declined by double-clicking the request there.

Exercise

For this exercise, log off as **Johnx.Manager#.** Log on as **Juniorx.Manager#.**

John Manager is going to be away attending a conference next week. He sent you a delegation request that you will review and accept.

Steps		
1	Select the **Requests** icon to open it.	
2	Click on **Mgr_Delegation**. The **Manage My Requests** widget displays.	
3	Highlight the request and click the **Show Detail** button.	
4	The **Accept Delegation** radio button is the default. The **Decline Delegation** may be selected. The **Comment** field is optional.	
5	Click **Save & Close**. **NOTE:** eSTART automatically sends a message to the delegator to confirm that you have accepted or declined the delegation request.	

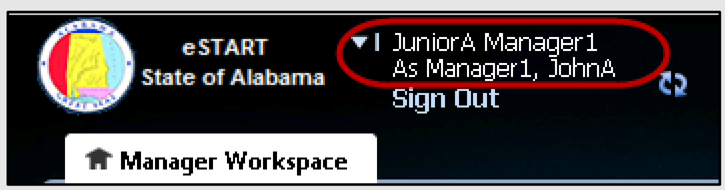
Switching to Delegated Roles

Purpose

After you accept a delegation request, the application automatically provides access to the tasks defined in the role profile on the specified start date. A Switch Role link displays as a quick link so that you do not have to log on as the manager who delegated the tasks to you. The link identifies which role you currently are working.

Exercise

John Manager delegated his tasks to you **(Junior Manager)** this week and you are ready to perform his timekeeping tasks. You do not need to log off as yourself and log on as the other manager because you can switch roles while logged on with your own user name and password.

Steps		
1	Click the **Delegate Authority** icon found just to the left of your username at the top of the Navigator window. **NOTE:** If you do not see the Switch Role link, log off and then log on again using your own user name and password.	
2	Click to select the manager whose tasks you will perform as his or her delegate.	
3	The username at the top of the Navigator now displays your name ***and*** the name of the person whose role you have assumed.	

NOTE

You can perform any management functions that are delegated to you for the delegating manager.

Cancelling Delegations

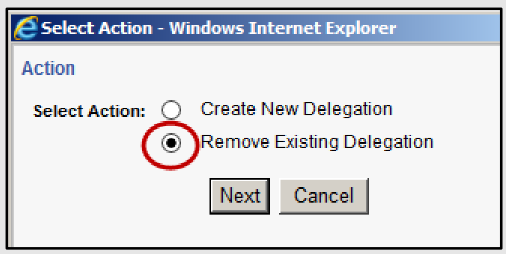
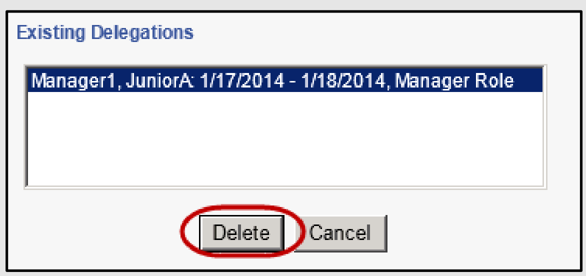
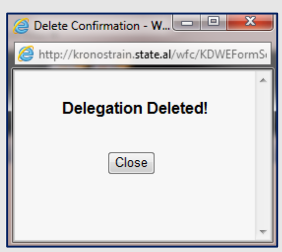
Purpose

The delegation rights are automatically removed on the end date. However, you can end the delegation earlier if you wish.

Exercise

For this exercise, log off as **Juniorx.Manager#** and log back in as **Johnx.Manager#.**

You **(John)** had delegated your management tasks to **Junior Manager** for two days. However, you returned the next day, so you will cancel the delegation.

Steps		
1	From the **Related Items** pane, select **Temporary Delegation**.	
2	From the list of actions, select **Mgr_Delegation**.	
3	Click **Remove Existing Delegation**.	
4	Click **Next**.	
5	Select the existing manager delegation that you want to cancel and click **Delete**.	
6	The **Delete Confirmation** message displays. Junior will no longer have the option to switch role. He will receive an email message about the cancellation.	

Creating Ad Hoc and Personal HyperFind Queries

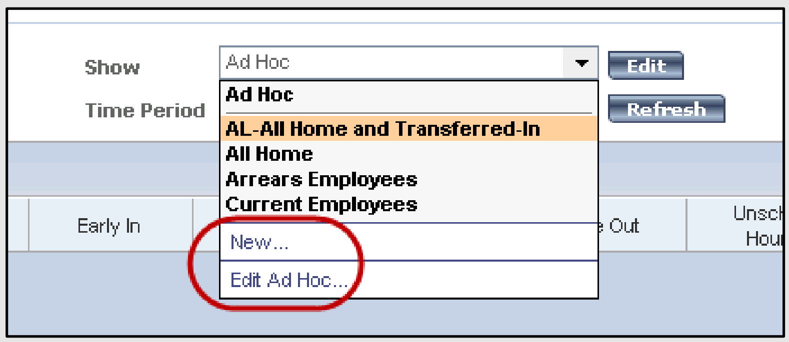
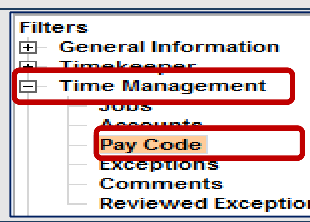
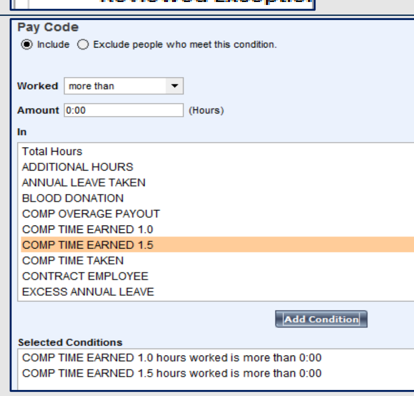
Purpose

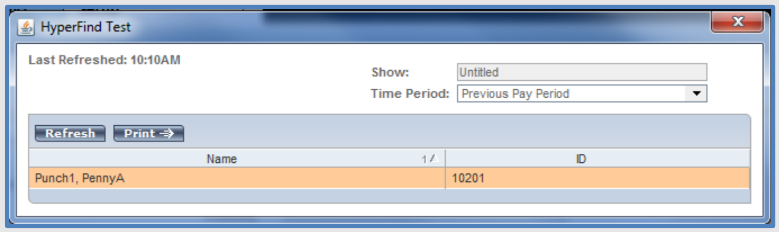
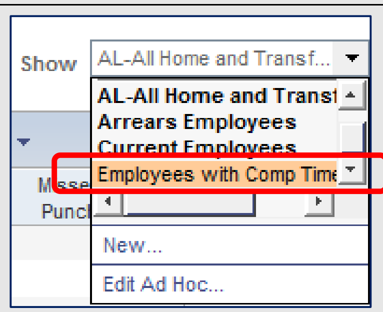
eSTART uses HyperFind queries to search and return employees who meet a specific set of criteria. You can use HyperFind queries in eSTART widgets and reports. All the options in the Show drop-down list are HyperFind queries. If an existing HyperFind query does not return the correct set of employees, you can create your own Ad Hoc query. Ad Hoc queries are temporary and are available only during your current session. Once you log off, Ad Hoc queries are no longer available.

Another option is to create a Personal query. Personal queries are available only to you and remain available until you remove them. However, you may share them with others.

Exercise

You want a quick way to access all employees with Comp Time hours. Create a Personal HyperFind query to see all employees that meet these criteria.

Steps		
1	From a widget, such as **Reconcile Timecard**, select one of the following from the **Show** drop-down list: • **Edit Ad Hoc** to modify the Ad Hoc query for this session only. • **New** to create a new personal query for reuse. For this exercise, select **New**. **NOTE:** This function may also be accessed from **Related Items>Setup>HyperFind Queries**.	
2	Select a filter from one of the filter categories. For this exercise, select **Time Management>Pay Code**.	
3	Radio buttons are available to choose **Include** or **Exclude people who meet this condition**. Leave **Include** selected.	

Steps		
4	**Worked** drop-down defaults to **More Than**. Leave this selected. Key **0.00** in the **Amount** field.	
5	Locate the Comp Time Pay Codes from the list, highlight **Comp Time Earned 1.0**.	
6	Click **Add Condition**.	
7	Repeat steps 5 through 6 to add **Comp Time Earned 1.5**.	
8	Click the **Test** button to review the sample query results. If no immediate results, choose **Previous Pay Period.** Click the **X** in the upper right-hand corner of the test window to close the dialog box. If you do not receive the results you expected, edit your conditions.	
9	Click **Save** or **Save As**.	
10	**Visibility** section • Select the **Personal – visible only to me** option if you want to be able to use the query on an ongoing basis. **NOTE:** Use the **Ad Hoc – temporary query** option if the query will only be needed temporarily.	
11	Type the name of your query in the **New Name** field**.** The **Description** field is optional.	
12	Click **OK**.	
13	If you created a Personal query, you will be able to view it in the Show list. Return to **Related Items>Reconcile Timecard** to view your query. Select **Previous Pay Period** from the **Time Period**. **Tip:** Personal queries display in regular text (not bold).	
14	Close the **Reconcile Timecard** tab.	

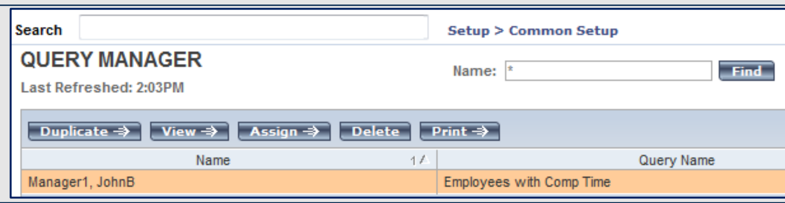
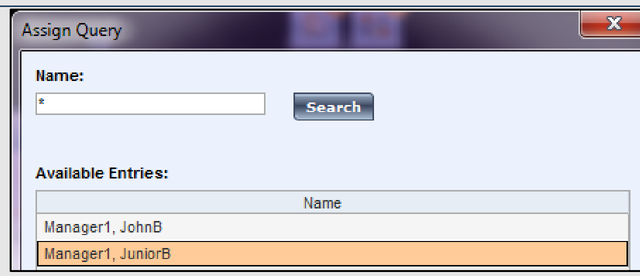
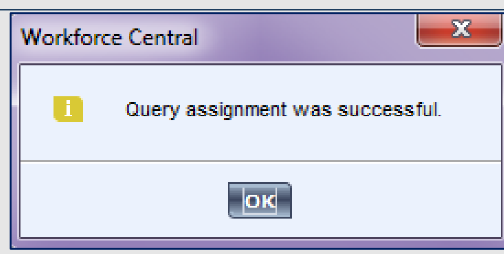
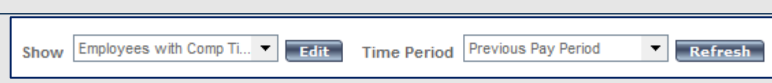
Assigning a Personal HyperFind Query to Another Manager

Purpose

A personal HyperFind query may ordinarily only be used by the person who created it. However, you may share it with another person or persons to whom it might be helpful.

Exercise

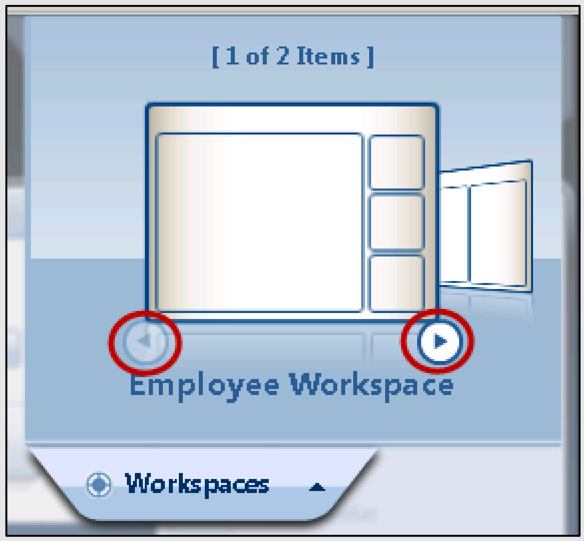
You created the HyperFind query above to assist with monitoring Comp Time. You feel this query would be helpful to other managers and wish to share it.

Steps		
1	From the **Related Items** pane, select **Setup**. Then, select **Query Manager.**	
2	Select **Find** to retrieve a list of existing queries.	
3	Highlight the query to be assigned. Click the **Assign** button.	
4	The **Assign Query** window displays with a list of available names. A **Search** field is available to narrow the search, if needed. Select **Junior Manager**.	
5	Message displays to indicate whether assignment was successful. Select the **OK** button. **NOTE:** Only one name may be selected. Repeat steps to add others, if needed.	
6	The assigned person now has access to the query from any of their **Show** drop-downs.	
7	Close **Setup** tab.	

Using the Employee Workspace

Sometimes you will need to access your own employee records. For example, you will need to submit your own requests for time off as an employee. To access your time and calendar data, you have access to a workspace called the Employee Workspace. You have fewer rights when accessing your own information than when accessing your employees' records.

Accessing the Employee Workspace

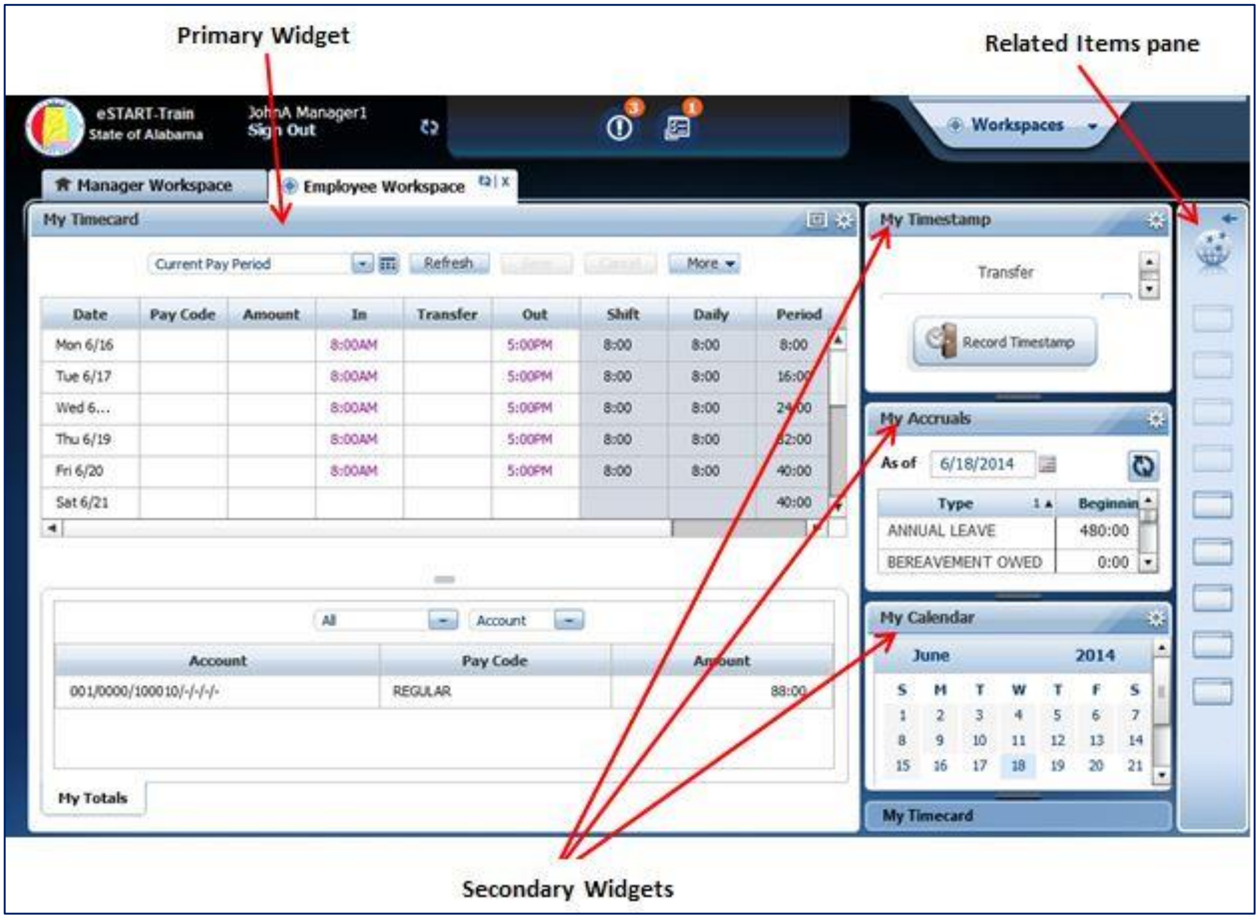
Steps		
1	Click the **Workspaces** tab.	
2	Click the **Employee Workspace** option.	

From this workspace, you have access to:

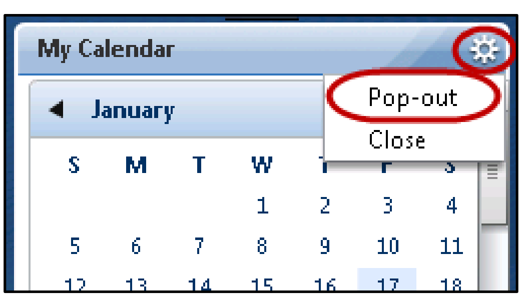
- My Timecard
- My Timestamp
- My Accruals
- My Calendar
- Change Password
- My Extended Leave Requests
- My Inbox
- My Reports
- My Time Off Requests

Primary and Secondary Widgets

The Employee Workspace includes its own Related Items pane as well as four default widgets. These widgets can be in a primary position or secondary position. In most cases, you can only work in the primary widget.



You can make a secondary widget the primary widget by clicking the gear icon in the upper-right corner of a widget and selecting **Pop-out**. The current primary widget will shift into a secondary widget position. Other available widgets can be accessed from the Related Items pane.



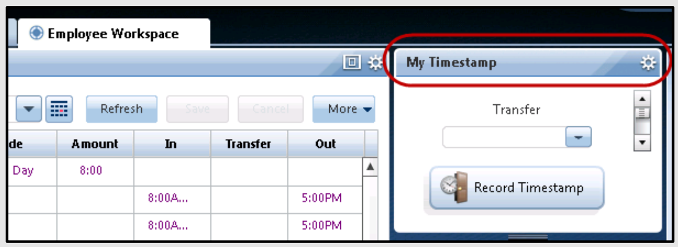
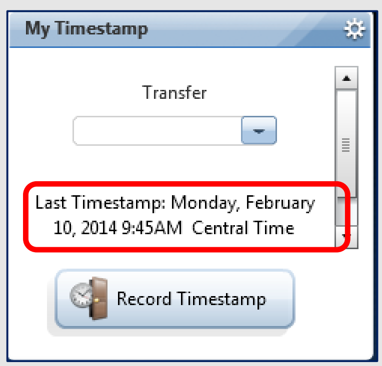
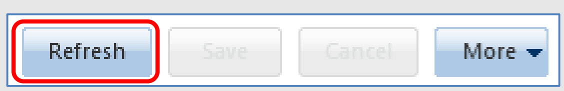
Using My Timestamp

Purpose

If you are an employee who is required to punch from your workstation, you will use the **My Timestamp** widget to record your punches during your shift.

Exercise

You want to record a punch for the start of your shift.

Steps		
1	Locate the **My Timestamp** widget	
2	Click the **Record Timestamp** button.	
3	**NOTE:** The date and time of the last recorded timestamp displays on the **My Timestamp** widget.	
4	Select the **Refresh** button to update the timecard.	

NOTE

There is a separate URL for the **Quick Time Stamp** application. This allows employees to quickly perform their time stamp without logging into the eSTART production application.

https://estart.alabama.gov/wfc/applications/wtk/html/ess/quick-ts.jsp

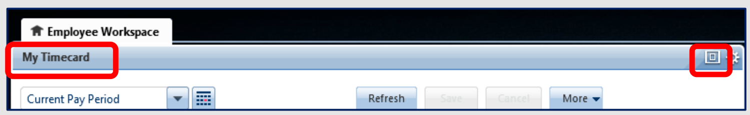
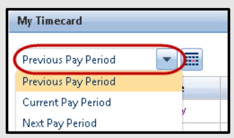
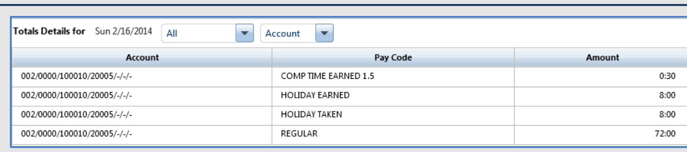
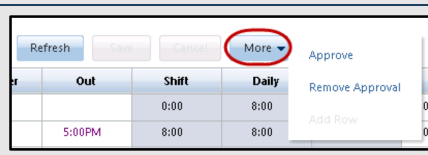
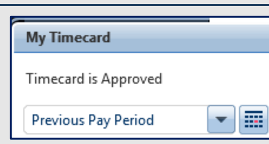
Reviewing and Approving your Time using My Timecard

Purpose

Your primary widget is your timecard. You will use the **My Timecard** widget to review your timecard and approve your time for the pay period. Currently, at the end of each pay period, you have to sign your timecard signifying that the times entered are true and correct. With eSTART, you electronically sign by "Approving" the electronic document.

Exercise

You want to review your timecard and approve it for the pay period.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>Verify that My Timecard is the primary widget.</td><td></td></tr>
<tr><td>2</td><td>(Optional) Click the Maximize button to enlarge the My Timecard widget.
NOTE: Use the same button to return the widget to its default size.</td><td>
</td></tr>
<tr><td>3</td><td>Select Previous Pay Period to review.</td><td>
</td></tr>
<tr><td>4</td><td>Review your timecard.
NOTE: You do not have rights to edit your own punches.</td><td>Blue = Excused Absence
Red = Exception (see manager before approving)
Green = Manager has marked as reviewed
 = Manager has added a comment
Purple = Populated by eSTART</td></tr>
<tr><td>5</td><td>Review the Totals Detail section of the timecard, which contains the breakdown of your worked and non-worked time.</td><td>
</td></tr>
<tr><td>6</td><td>To approve your timecard for the selected time period, click the More button and select Approve.</td><td>
</td></tr>
<tr><td>7</td><td>Timecard is Approved displays above the Time Period drop-down.</td><td>
</td></tr>
<tr><td>8</td><td>Select Restore Down to return the timecard widget to its original size.</td><td></td></tr>
</table>

NOTE

A reminder to approve timecards will be sent to your inbox the day after the end of the pay period. Users who have an Agency email account will also receive these messages in their mailboxes.

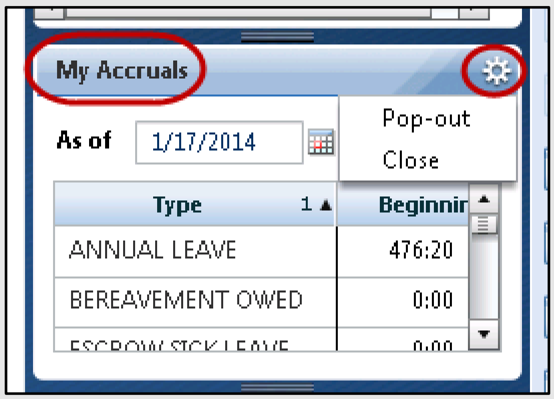
Using My Accruals

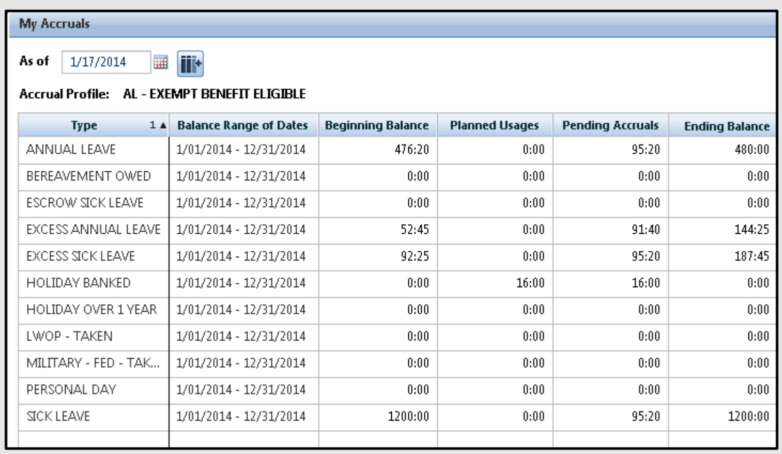
Purpose

As an employee, you can review your own accrual balances from the Employee workspace using the **My Accruals** widget.

Exercise

You want to review your leave balances from the Employee workspace.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>Locate the My Accruals widget.</td><td rowspan="2">
</td></tr>
<tr><td>2</td><td>Click the gear icon on the My Accruals widget and select Pop-out.

NOTE: Another option is to click on the widget and drag it to the main workspace.</td></tr>
<tr><td>3</td><td>The My Accruals widget displays:
Type: The type of accrual balance, such as Annual Leave or Sick Leave
Balance Range of Dates: The leave reporting period (current year)
Beginning Balance: The accrual balance from the payroll system as of the date in the As of drop-down
Planned Usages: The total amount of time scheduled to be taken, from the As of date through the end of the Reporting Period (12/31)
Pending Accruals: The total accruals projected from the As of date through the end of the Reporting Period (12/31)
Ending Balance: The total accruals projected from the As of date through the end of the Reporting Period (12/31)</td><td>

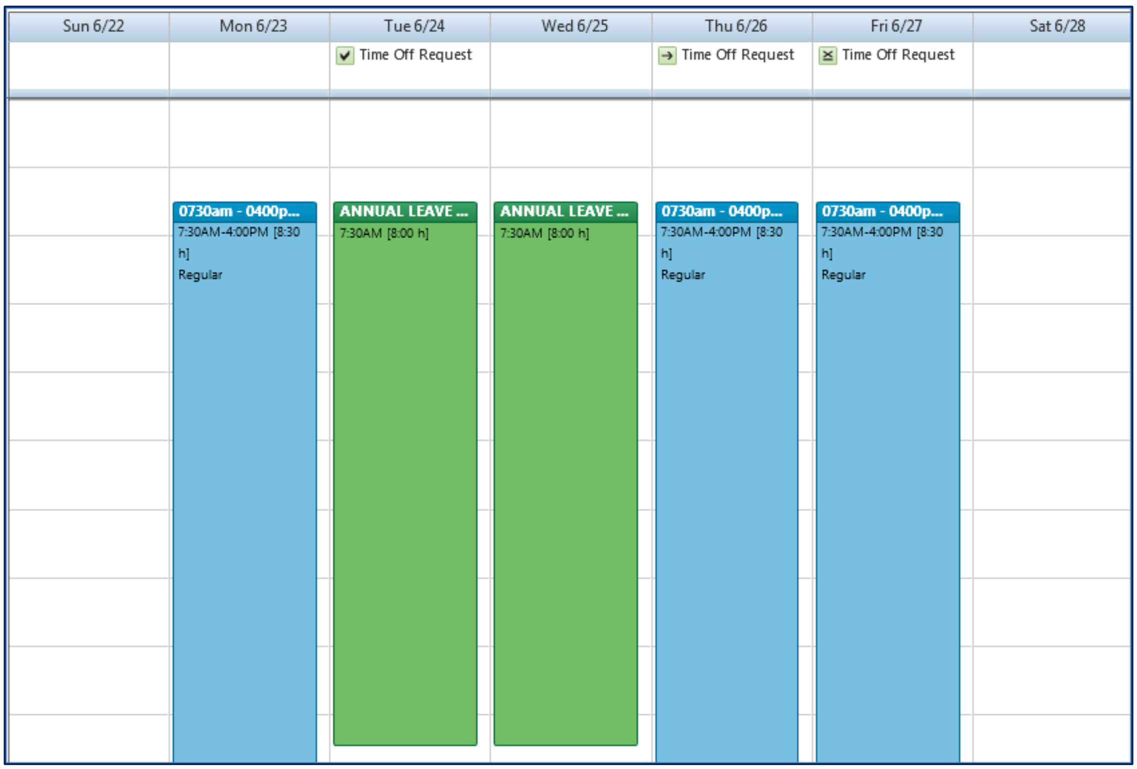
<table>
<tr><th>Type 1 ▲</th><th>Balance Range of Dates</th><th>Beginning Balance</th><th>Planned Usages</th><th>Pending Accruals</th><th>Ending Balance</th></tr>
<tr><td>ANNUAL LEAVE</td><td>1/01/2014 - 12/31/2014</td><td>476:20</td><td>0:00</td><td>95:20</td><td>480:00</td></tr>
<tr><td>BEREAVEMENT OWED</td><td>1/01/2014 - 12/31/2014</td><td>0:00</td><td>0:00</td><td>0:00</td><td>0:00</td></tr>
<tr><td>ESCROW SICK LEAVE</td><td>1/01/2014 - 12/31/2014</td><td>0:00</td><td>0:00</td><td>0:00</td><td>0:00</td></tr>
<tr><td>EXCESS ANNUAL LEAVE</td><td>1/01/2014 - 12/31/2014</td><td>52:45</td><td>0:00</td><td>91:40</td><td>144:25</td></tr>
<tr><td>EXCESS SICK LEAVE</td><td>1/01/2014 - 12/31/2014</td><td>92:25</td><td>0:00</td><td>95:20</td><td>187:45</td></tr>
<tr><td>HOLIDAY BANKED</td><td>1/01/2014 - 12/31/2014</td><td>0:00</td><td>16:00</td><td>16:00</td><td>0:00</td></tr>
<tr><td>HOLIDAY OVER 1 YEAR</td><td>1/01/2014 - 12/31/2014</td><td>0:00</td><td>0:00</td><td>0:00</td><td>0:00</td></tr>
<tr><td>LWOP - TAKEN</td><td>1/01/2014 - 12/31/2014</td><td>0:00</td><td>0:00</td><td>0:00</td><td>0:00</td></tr>
<tr><td>MILITARY - FED - TAK...</td><td>1/01/2014 - 12/31/2014</td><td>0:00</td><td>0:00</td><td>0:00</td><td>0:00</td></tr>
<tr><td>PERSONAL DAY</td><td>1/01/2014 - 12/31/2014</td><td>0:00</td><td>0:00</td><td>0:00</td><td>0:00</td></tr>
<tr><td>SICK LEAVE</td><td>1/01/2014 - 12/31/2014</td><td>1200:00</td><td>0:00</td><td>95:20</td><td>1200:00</td></tr>
</table></td></tr>
</table>

Viewing My Calendar

Purpose

The **My Calendar** widget is used to view your schedule information and to view and request time off. You can hover over a shift to view more detailed information. You can also change the view size and use the filter at the top to show and hide particular item types in the calendar.

The following illustration shows a week wide view.



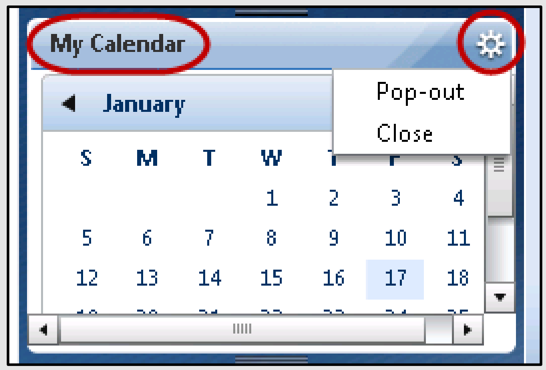
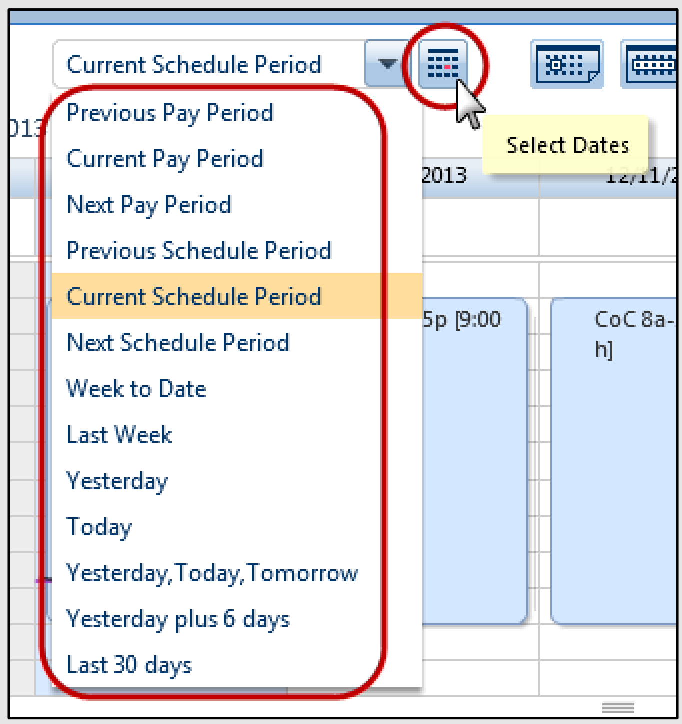
Navigating in a calendar

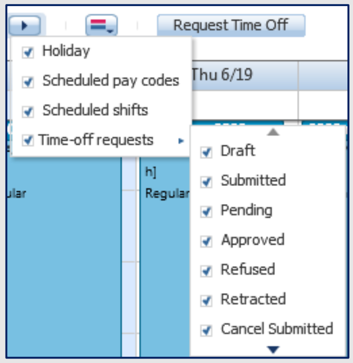
The table below describes the actions that display information in a calendar for data analysis.

Action	Step
To view details of a particular day	Place your cursor over a shift to view details, such as the labor account the hours are assigned to for the shift.
To view different calendar formats	Select to view one day across the screen. Select to view one week across the screen. Select to view one month across the screen.
To view certain elements in your calendar	Select to display elements such as, time off requests, holidays, scheduled pay codes, or scheduled shifts. Uncheck an item to remove it from the display.

Exercise

You want to review your own calendar for the current week. Access My Calendar and use the tools to look at your calendar in different formats.

Steps		
1	Locate the **My Calendar** widget. **NOTE:** This widget may still be open from the previous exercise.	
2	Click the gear icon on the **My Calendar** widget and select **Pop-out**.	
3	From the **Time Period** drop-down, select **Current Schedule Period.**	
4	You can also adjust the width of the calendar view.	

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>5</td><td>Click the Filter icon to select the elements you want to view in your calendar. Uncheck an item to remove it from the display.</td><td>
</td></tr>
<tr><td>6</td><td>Review information in the calendar workspace.</td><td></td></tr>
<tr><td>7</td><td>Return calendar to By Week view.</td><td></td></tr>
</table>

Request Symbols

The symbols below will display on the request in the calendar, indicating the status of the request.

	Submitted - for approval **or** cancellation
	Retracted - prior to manager approval
	Approved - for taking **or** for cancellation
	Pending
	Refused

Changing Your Password

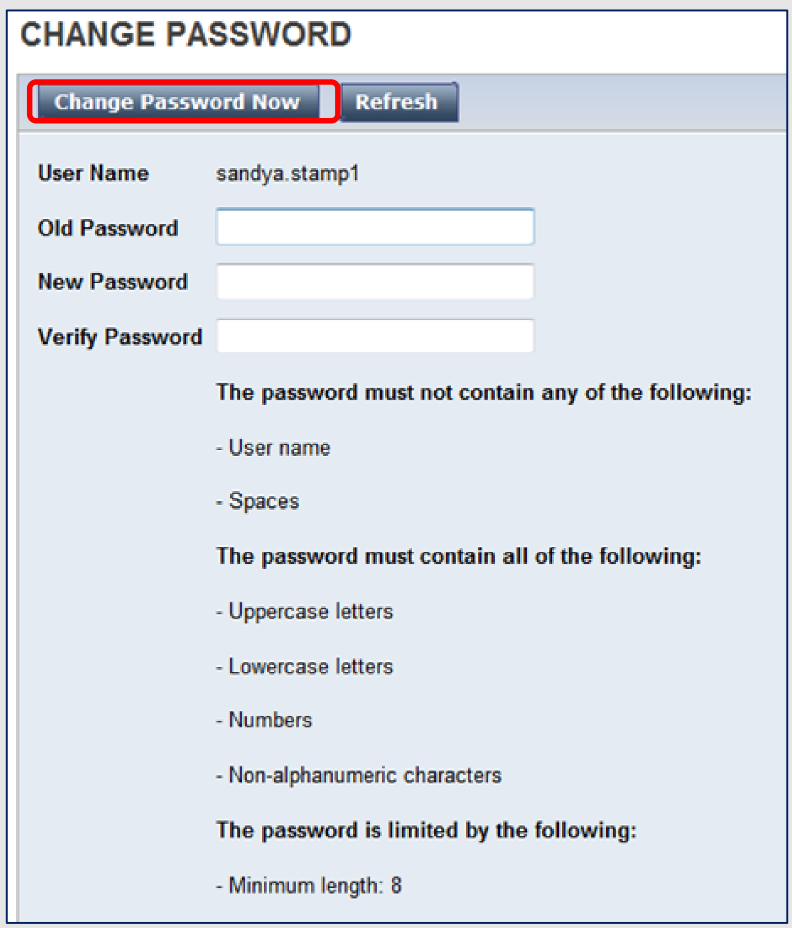
Purpose

If you have a Network/Email ID, your Logon ID is your email address; your password is your network password. You **cannot** use the Change Password widget on eSTART. Contact your agency Help Desk/IT staff to change your password.

If you do **not** have an email address, your ID will be **firstname.lastname** and your initial password will be **P@ssw0rdxxx** (xxx = your agency number). You are required to change your password at first login. Then you can use the **Change Password** widget to change your password.

Exercise

Follow the steps below to change your password.

Steps		
1	From the **Employee Workspace**, open the **Related Items** pane and select **Change Password**.	
2	In the **Old Password** field, enter the password you want to replace.	
3	In the **New Password** field, enter the new password.	
4	In the **Verify Password** field, re-enter the new password.	
5	Click **Change Password Now**.	

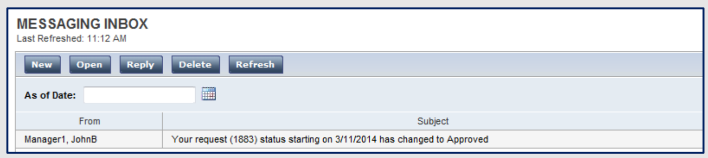
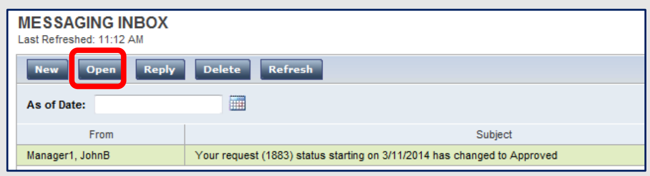
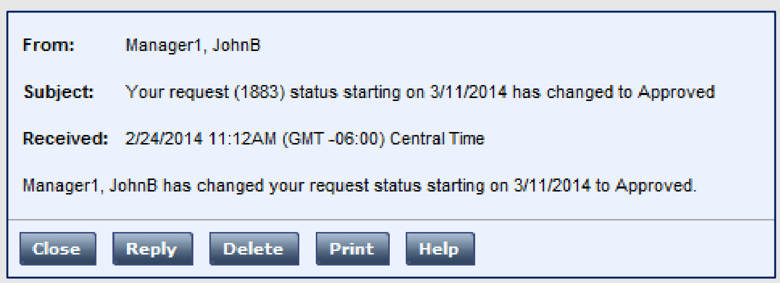
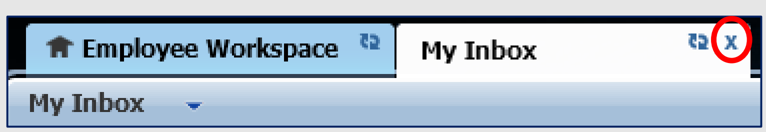
Using My Inbox

Purpose

When you submit a request for time off, the manager's response displays in your eSTART Inbox. You can review these messages in **My Inbox**.

Example

You want to review any messages you have received in eSTART.

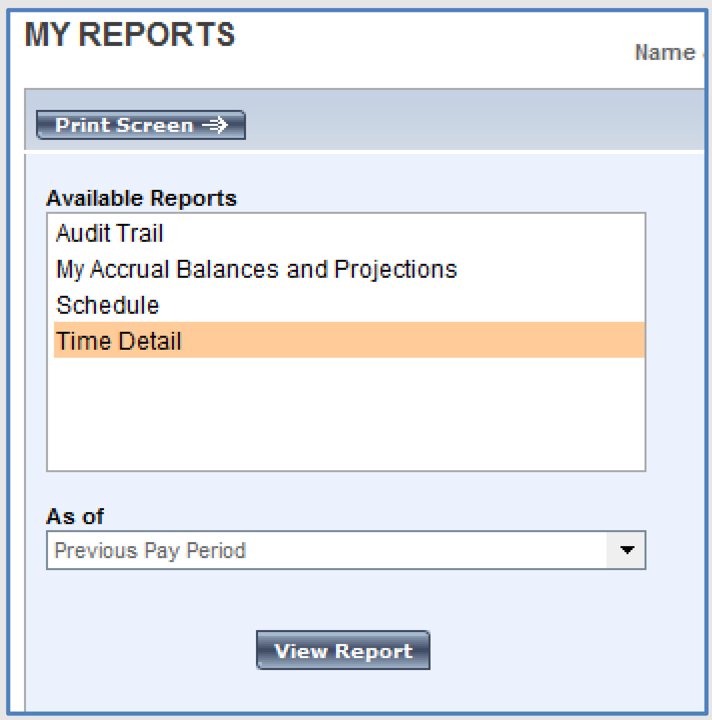
Steps		
1	Select **My Inbox** from the **Related Items** pane.	
2	Click the **Messages** tab to review your messages.	
3	To read a message, select the message and click **Open**.	
4	After you have reviewed the message, select one of the following: • Click **Reply** to respond to the message. • Click **Close** to close the message and return to the Inbox. • Click **Delete** to remove the message from the Inbox. • Click **Print** to print the message to your local printer. Select **Close**.	
5	To close the **My Inbox** tab, hover your cursor over the **My Inbox** tab and then click the **X**.	

Using My Reports

Purpose

There may be times when you would like to print out information such as your audit trail, leave accrual balances, schedule or timecard data. You have access to four employee reports for this information using the **My Reports** widget. When you run one of these reports, it displays in a web browser tab or window, and you print the report using the web browser's Print options.

Exercise

Steps		
1	Select **My Reports** from the **Related Items** pane.	
2	Select **Time Detail** from the **Available Reports**. For this exercise, select **Time Detail.**	
3	Select **Previous Pay Period** from the **As of** drop-down list.	
4	Click **View Report**. The report will open in a new browser window. You may print the report using the browser's **File>Print** options.	

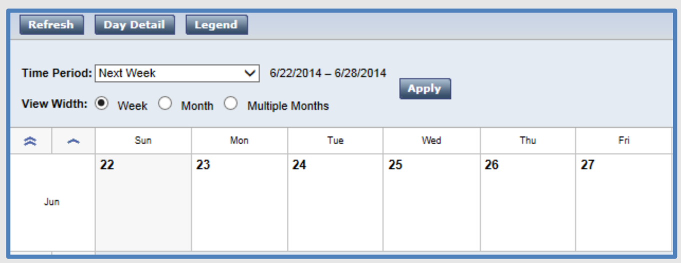
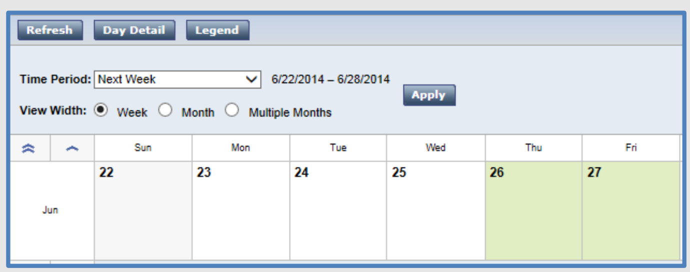
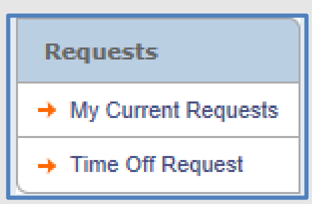
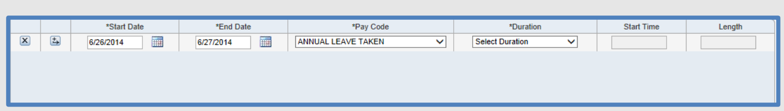
Requesting Time Off

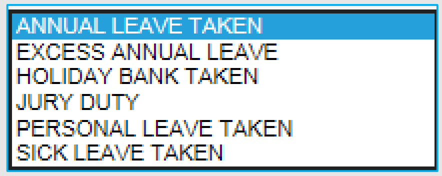
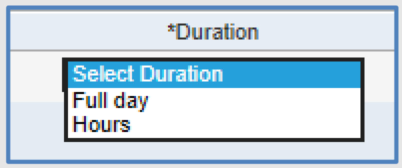
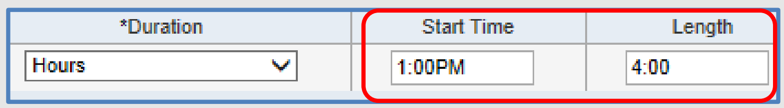
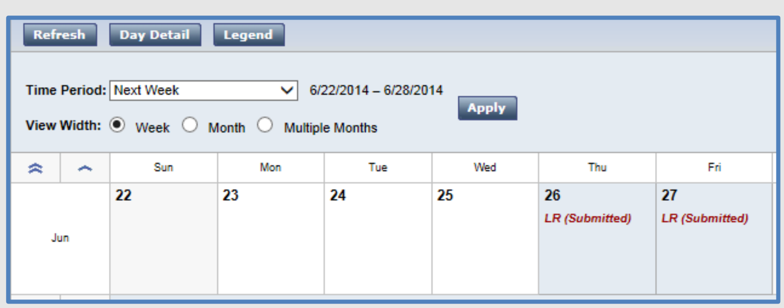
Purpose

The **Request Time Off** screen displays a calendar to provide a consistent, easily accessible way to request or cancel time off. eSTART forwards the request to your manager to handle appropriately.

Exercise

Your childcare provider will be unavailable **next Thursday and Friday** and you need to take the afternoons off. Submit a time off request for **four hours** of **Annual Leave** each day starting at **1 p.m. for next Thursday and Friday**.

Steps		
1	From **Related Items**, select **My Time Off Requests.**	
2	In the calendar that displays, select **Next Week** from the **Time Period** drop-down. Then click the **Apply** button.	
3	In the calendar, click on **Thursday** and **Friday.** The dates should become highlighted in light green.	
4	Select **Time Off Request** from the lower left menu. **NOTE:** The **My Current Requests** selection may be used to view existing requests.	
5	The dates selected in the calendar should be populated in the **Start Date** and **End Date** fields, but can be changed it needed.	

Steps		
6	Select the **Pay Code** from the drop-down list.	
7	Select a **Duration** type. If you select **Full Day**, your scheduled hours will be used to determine the amount of time charged for each day. If you select **Hours**, you must specify a **Start time** and **Length** for the leave time to be used for each requested day. For this exercise, select **Hours.** Select **Tab** to move to the next field.	
8	Enter the **Start Time** of **1p** (always use am/pm) for the leave and **4** in the **Length** field. **NOTE:** The Start Time must be submitted in <u>15-minute increments</u>. **NOTE:** The **Length** field contains the <u>number of hours</u> being requested. The number of hours must be in <u>15-minute increments</u>.	
9	(Optional) Enter **Notes** for the request.	
10	Click **Submit**.	
11	The request has been submitted for approval and displays in the employee's calendar with the **Submitted** status. **NOTE:** Once the requested time is approved by your manager, the schedule will automatically be updated to show the scheduled leave time for the requested days.	

Best Business Practice

All requests for time off, including doctor visits (sick leave), should be submitted through the time clock or eSTART application.

Submit multiple requests whenever time off requests span across weekends to prevent the request from displaying in the timecard with zero hours for those days. A request that spans a holiday will result in the leave being charged on that day, which would require cancelling and resubmitting the request.

NOTE

Employees have access to specific pay codes when submitting a time off request. Additional selections are available if the employee has an open and approved extended leave case. The selections will vary based on the type of leave case. See the **Employee Pay Codes for Time Off Requests** job aid for a list of these pay codes.

Tip

The **Request Time Off** selection within the **My Calendar** widget can also be used to request time off.

Annual Leave Cascade

A cascade defines how leave time is processed in the system. If Annual Leave is selected in eSTART, leave will be used, based on the time of the year, in the order as described in the chart below:

Annual Leave Cascade	
January 1 – July 31	**August 1 – December 31**
Comp Time	Personal Day
Excess Annual	Excess Annual
Annual	Comp Time
	Annual

NOTE

The following are not impacted by the cascade:

- Follow your agency's policy and procedures regarding the usage of personal leave days before August 1st.
- Your holiday banked time may be scheduled by your supervisor in the quarter in which it was earned.

If the cascade makes a change to the type of leave originally submitted, the timecard will display the information as indicated below. The changes made by the cascade will be shaded in gray. There will be a **Historical Amounts** tab on the lower portion of the page. This tab will display the changes that were made by the cascade.

In this example, the original request was for two hours of annual leave in May. Since the employee had one hour of Comp Time and also had Excess Annual Leave time, the cascade reversed the original request for annual leave, used the Comp Time first, then the Excess Annual Leave.

Save | Actions | Punch | Amount | Accruals | Comment | Approvals | Overtime | Reports | Leave

Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Cumu
Thu 5/08			7:58AM		4:00PM				8:00	8:00	48:00
Fri 5/09			7:58AM		1:00PM	1:30PM		4:30PM	8:00	8:00	56:00
Sat 5/10											56:00
Sun 5/11											56:00
Mon 5/12			7:55AM		1:00PM	1:30PM		4:30PM	8:00	8:00	64:00
Tue 5/13			7:59AM		12:01PM	12:31PM		4:30PM	8:00	8:00	72:00
Wed 5/14	ANNUAL LEAVE TAKEN	-2:00									
Wed 5/14	COMP TIME TAKEN	1:00									
Wed 5/14	EXCESS ANNUAL LEAVE	1:00									
Wed 5/14			8:05AM		2:03PM				6:00		
Wed 5/14	ANNUAL LEAVE TAKEN	2:00	2:00PM							8:00	80:00
Thu 5/15			8:00AM		10:00AM				2:00		

TOTALS & SCHEDULE | LEAVE REPORTING PERIOD VIEW | AUDITS | COMMENTS | SIGN-OFFS, REQUESTS & APPROVALS | HISTORICAL AMOUNTS

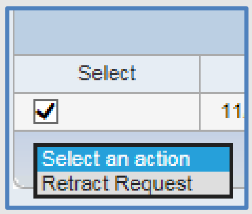
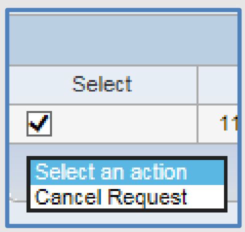
Effective Date	Historical Date	Type of Edit	From Account	To Account	From Pay Code	To Pay Code	Amount	Comments	Note
5/21/2014	5/14/2014	Historical Pay Code Edit				COMP TIME TAKEN	1:00 (paid)	Cascade Change	
5/21/2014	5/14/2014	Historical Pay Code Edit				ANNUAL LEAVE T...	-2:00 (paid)	Cascade Change	
5/21/2014	5/14/2014	Historical Pay Code Edit				EXCESS ANNUAL L...	1:00 (paid)	Cascade Change	

The **Comments** tab will also display a comment to indicate the change was made by the cascade.

Wed 5/14	Cascade Change
Wed 5/14	Cascade Change
Wed 5/14	Cascade Change

Cancelling a Time Off Request

If your need for time off changes, you may cancel or retract a request.

Steps		
1	From **Related Items**, select **My Time Off Requests.**	
2	Scroll to the lower portion of the page. Current requests display in the **My Current Requests** section. Place a check mark in the **Select** column to the left of the request to be cancelled.	
3	From the **Select an action** drop-down, select one of the following: • **Retract Request -** if the request has **NOT** been approved by your manager. • **Cancel Request –** if the request **HAS** been approved by your manager. **NOTE:** Cancellations must be approved by your manager.	 
4	Click **Apply**.	

Tip

Cancelled requests must be approved by your manager.

The **My Calendar** widget may also be used to cancel/retract time off requests.

You cannot cancel part of a request. All days associated with a request are cancelled. For example, if you originally requested three days off and then decide you only need two days, you must cancel the original request and submit a new request for two days.

Using My Extended Leave Requests

Purpose

Employees can submit a request for extended leave for FMLA (Family and Medical Leave Act) or Military Leave using eSTART. Employees who are already on leave of absence can request additional time against an existing leave case using the same workspace. Requests for new leave cases and additional leave time are forwarded to your Agency's Leave Administrator.

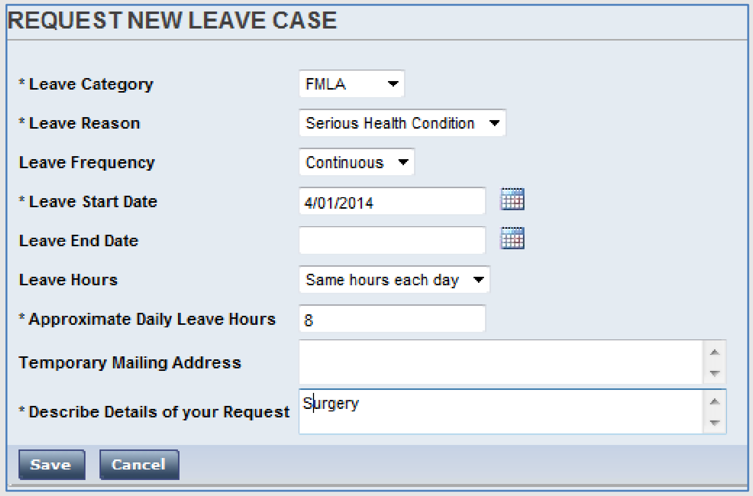
Exercise

You have upcoming surgery and need to request FMLA leave from work. Submit a continuous leave request for FMLA time.

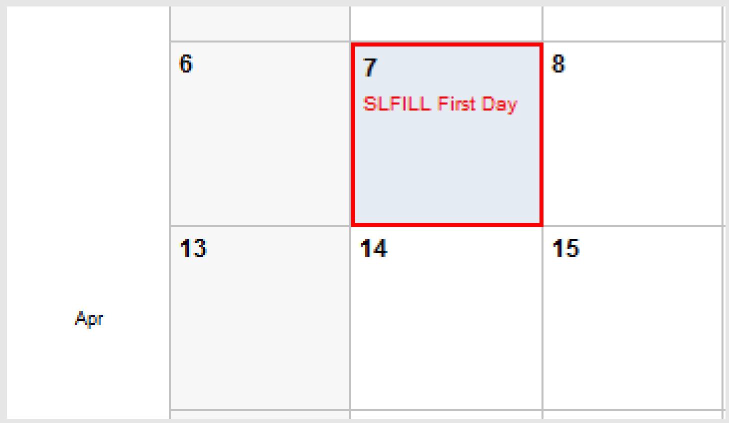
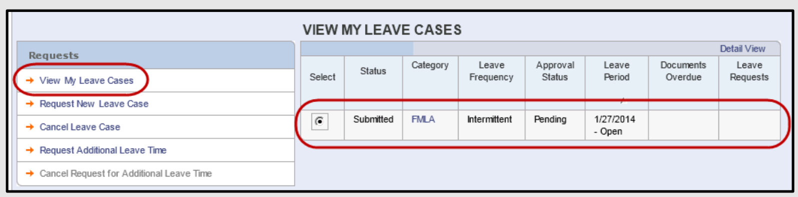
Steps		
1	Select **My Extended Leave Requests** from the **Related Items** pane.	
2	In the **My Leave Requests** calendar, click **Request New Leave Case** from the **Requests** list.	

Steps

3	From the **Leave Category** drop-down list, select the type of leave: Choose **FMLA**.
4	From the **Leave Reason** drop-down list, select **Serious Health Condition.**
5	From the **Leave Frequency** drop-down list, select **Continuous.**
6	From the **Leave Start Date** drop-down calendar, select **1st Monday of the following month.**
7	From the **Leave End Date** drop-down calendar, select the date when you expect the leave to end. **NOTE:** You can leave this field blank if the end date is unknown. For this exercise, leave the field **blank**.
8	Leave **Same hours each day** selected in the **Leave Hours** field.
9	In the **Approximate Daily Leave Hours** field, enter the number of hours you expect to take each day. For this exercise, key **8.**
10	The **Temporary Mailing Address** is an optional field that can be used to inform of the address of the relative you are assisting or the rehab center where you will be staying, etc.
11	Enter an explanation of the leave request in the **Describe Details of Your Request** field. Key **Surgery.**
12	Click **Save**. A message displays: **Notification has been sent to leave administrator**.

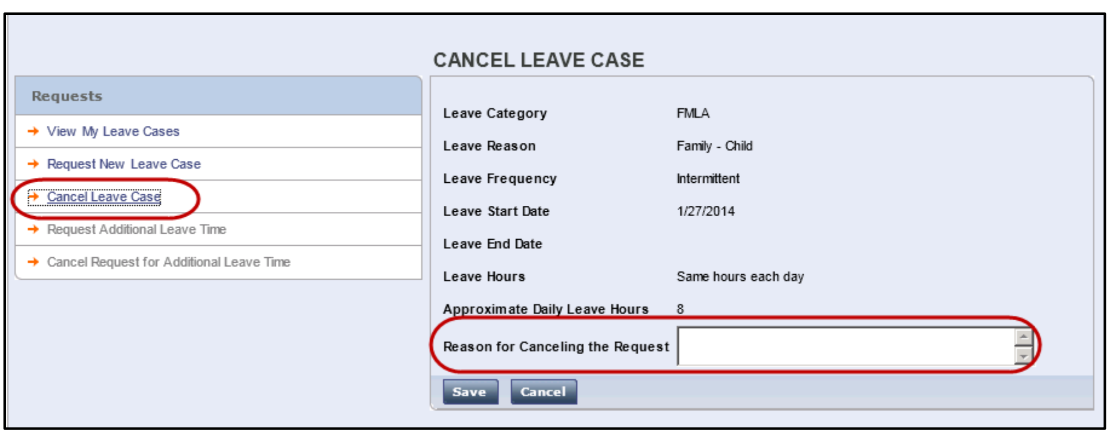


NOTE: (*) Asterisk - Denotes a required field

Steps		
13	Choose **Next Month** from the **Time Period** drop-down. Click **Apply.**	
14	The Leave Request displays as an entry in the **My Leave Requests** calendar.	
15	To review your leave requests, select **View My Leave Cases** from the **Requests** list.	

NOTE

You may cancel a leave case request from the same **My Extended Leave Requests** calendar as well. Select a leave case and click **Cancel Leave Case** in the **Requests** list. Enter a reason for cancelling the request and click **Save**.



NOTES: